

2001
FORM
40A
FULL YEAR
RESIDENTS ONLY
Alabama
Individual
Income
Tax Return

L A B E L H E R E	Your first name and initial (if joint return, also give spouse's first name and initial)		Last name	
	Present home address (number and street or P. O. Box number)			
	PLACE LABEL HERE			
	City, town or post office, state, and ZIP code			

Your social security number	
:	:
:	:
Spouse's soc. sec. no. if joint return	
:	:
:	:
FN (For official use only)	

Filing Status
and
Exemptions

Check only one box

1	<input type="checkbox"/>	\$1,500 Single
2	<input type="checkbox"/>	\$3,000 Married filing joint return (even if only one spouse had income)
3	<input type="checkbox"/>	\$1,500 Married filing separate return. Complete line 5 with spouse's name and soc. sec. no.
4	<input type="checkbox"/>	\$3,000 Head of family (with qualifying person). (See page 7 of instructions.) Complete line 5.

5	Name	
	Soc. Sec. No.	
	Relationship	

Income
and
Adjustments

6	Wages, salaries, tips, etc. (list each employer and address separately).		A — Alabama tax withheld		B — Income				
a			6a		00	6a		00	
b			6b		00	6b		00	
c			6c		00	6c		00	
d			6d		00	6d		00	
7	Interest and dividend income. If over \$1,500.00, use Form 40						7		00
8	Total income. Add lines 6a through 6d and 7 (column B)						8		00

Deductions

You Must Attach page 2 of Federal Form 1040, page 1 of Federal Form 1040A or 1040EZ, or a copy of your Telefile Schedule if claiming a deduction on line 10.

9	Standard Deduction (complete Part III, and enter amount here)	9		00
10	Federal tax liability deduction (complete Part IV and enter amount here)	10		00
11	Personal exemption (from line 1, 2, 3, or 4)	11		00
12	Dependent exemptions (from page 2, Part II, line 2)	12		00
13	Total deductions. Add lines 9, 10, 11, and 12	13		00

Tax and
Payments

Staple Form(s)
W-2, W-2G,
and/or 1099
here.

14	Taxable income. Subtract line 13 from line 8. Enter the result				14		00
15	Find the tax for the amount on line 14. Use the tax table in the Instruction Booklet.				15		00
16	Consumer Use Tax (use worksheet on page 9)				16		00
17	You may make a voluntary contribution to:				17a		00
	a	Alabama Democratic Party	<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17b		00	
	b	Alabama Republican Party	<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17c		00	
	c	Alabama Libertarian Party	<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17d		00	
	d	Neighbors Helping Neighbors	\$	18		00	
18	Total tax liability and voluntary contribution. Add lines 15, 16, 17a, 17b, 17c, and 17d				18		00
19	Alabama income tax withheld. Add lines 6a thru 6d, column A				19		00

AMOUNT
YOU OWE

20	If line 18 is larger than line 19, subtract line 19 from line 18, and enter AMOUNT YOU OWE.		00
Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.)			
If paying by credit card do not include Form 40V and check here <input type="checkbox"/>			

OVERPAID

21	If line 19 is larger than line 18, subtract line 18 from line 19 and enter amount OVERPAID		21		00
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Donation
Check-offs

22	You may donate all or part of your overpayment. (Enter \$1, \$5, \$10, \$25, none, or other amount in the appropriate boxes).				22		00
a	Senior Services Trust Fund		00	f	AL Indian Children's Scholarship Fund		00
b	AL Arts Development Fund		00	g	Penny Trust Fund		00
c	AL Nongame Wildlife Fund		00	h	Foster Care Trust Fund		00
d	Child Abuse Trust Fund		00	i	Mental Health		00
e	AL Veterans Program		00	j	AL Breast & Cervical Cancer Program		00
23	Total. Add lines 22a, b, c, d, e, f, g, h, i, and j				23		00

REFUND

24	REFUNDED TO YOU. Subtract line 23 from line 21.		CN		00
(CAUTION: You must sign this return before it can be processed.)			24		00

Please
Sign
Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements and to the best of my knowledge and belief they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Your signature		Date	Daytime Telephone No.	Spouse's signature (if filing jointly, BOTH must sign)	
Preparer's signature		Date	Check if self-employed <input type="checkbox"/>	Preparer's SSN or PTIN	
Firm's name (or yours, if self-employed) and address			E.I. No.		
			ZIP Code		

Paid
Preparer's
Use Only

PART I**General Information**All Taxpayers
Must Complete
This Section

- 1 Were you (and your spouse, if married filing jointly) a resident of Alabama for the entire year 2001? ☐ Yes ☐ No
If you checked no, **DO NOT COMPLETE THIS FORM.** See "Which Form To File" on page 5 of instructions.
- 2 Did you file an Alabama income tax return for the year 2000? ☐ Yes ☐ No
If you checked no, state the reason for not filing. _____
- 3 Give name and address of your present employer:
Yourself _____
Your Spouse _____
- 4 Your occupation _____ Spouse's occupation _____
- 5 Enter the Federal Adjusted Gross Income \$ _____ and Federal Taxable Income \$ _____ as reported on your **2001** Federal Individual Income Tax Return.
- 6 Do you have income which is reported on your Federal return, but not reported on your Alabama return? ☐ Yes ☐ No
If yes, enter source(s) and amount(s) below (*other than state income tax refund*):
Source _____ Amount \$ _____
Source _____ Amount \$ _____
Source _____ Amount \$ _____

PART II**Dependents**Do not include
yourself or
your spouse

(See page 10)

- | 1a Dependents:
(1) First name | Last name | (2) Dependent's social security number. | (3) Dependent's relationship to you. | (4) Did you provide more than 50% of dependent's support? |
|----------------------------------|-----------|---|--------------------------------------|---|
| | | | | |
| | | | | |
| | | | | |
| | | | | |
- b Total number of dependents claimed above _____
- 2 **Amount allowed.** (Multiply \$300 by the total number of dependents claimed on line 1b.)
Enter amount here and on page 1, line 12 2 00

PART III**Standard Deduction Computation**All Taxpayers
Must Complete
This Section

- Indicate the filing status you checked on page 1, Form 40A:
Filing Status 1 ☐ Single 2 ☐ Married filing joint 3 ☐ Married filing separate 4 ☐ Head of family
- 1a Enter total income as shown on line 8, page 1, Form 40A. 1 00
- b Multiply this amount by 20% x 20%
- 2 Enter the result on this line. 2 00
- 3a If you checked filing status 1, 3, or 4, enter \$2,000, or
- b If you checked filing status 2, enter \$4,000. 3 00
- Standard deduction allowable.** Compare the amounts on lines 2 and 3 above.
Enter **ONLY THE SMALLER AMOUNT** on line 9, page 1, Form 40A.

PART IV**Federal Tax Liability Deduction**

- 1 Enter the Federal Income Tax Liability as shown on your 2001 federal return. 1 00
If you filed a 2001: **Telefile Form** – Enter the "tax" from line K
Form 1040EZ – Enter the amount from line 10
Form 1040A – Enter the amount from line 33
Form 1040 – Enter the amount from line 52, plus any amount on line 55
- 2 Enter your 2001 Federal Income Tax Rebate 2 00
- 3 Subtract line 2 from line 1. Enter the amount here and on line 10, page 1, Form 40A 3 00

Final Checklist**Before Mailing Your Return Have You —**

- Checked your name and address to see if it is correct? Your refund will be mailed to the address shown on your return. (Use your peel off label if you have one.)
- Entered your social security number(s) in the space(s) provided?
- Attached all of your withholding statements?
- Signed your return? If filing a joint return, your spouse must also sign.
- Placed payment, along with Form 40V, loose in the mailing envelope.
- Made a copy of this return for your records? You will need a copy in case you have questions about your return after you have mailed it to us.
- Used the mailing envelope provided in the booklet mailed to you?

Each year thousands of refunds are delayed because of incorrect addresses or other errors. Please take a few minutes to check your return before you mail it. Filing a complete and accurate return will help us process your refund faster.

Where To File Form 40A

If an addressed envelope came with your return, please use it. If you do not have one, mail your return to one of the addresses below.

If you are **not** making a payment, mail your return to:

Alabama Department of Revenue
P. O. Box 327465
Montgomery, AL 36132-7465

If you are making a payment, mail your return, Form 40V, and payment to:

Alabama Department of Revenue
P. O. Box 327477
Montgomery, AL 36132-7477

Mail **ONLY** your 2001 Form 40A to one of the above addresses. Amended returns and all other correspondence should be mailed to: Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.