

2018 IA 1040 Iowa Individual Income Tax Return

For fiscal year beginning / / and ending / /

Step 1: Fill in all spaces. You must fill in your Social Security Number (SSN).
Your last name Your first name/middle initial

Spouse's last name Spouse's first name/middle initial

Current mailing address (number and street, apartment, lot, or suite number) or PO Box

City, State, ZIP

Spouse SSN Your SSN

Step 2 Filing Status: Mark one box only

1 Single: Were you claimed as a dependent on another person's Iowa return? Yes No
2 Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)
3 Married filing separately on this combined return. Spouse use column B.
4 Married filing separate returns. Spouse's name: SSN: Net Income: \$
5 Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and SSN below.
6 Qualifying widow(er) with dependent child. Name: SSN:

Step 3 Exemptions

a. Personal Credit: Col. A: Enter 1 (enter 2 if filing status 2 or 5); Col. B: Enter 1 if filing status 3
b. Enter 1 for each taxpayer who is 65 or older and/or 1 for each taxpayer who is blind
c. Dependents: Enter 1 for each dependent
d. Enter first names of dependents here
B. Spouse (Filing Status 3 ONLY)
A. You or Joint
X \$ 40 = \$
X \$ 20 = \$
X \$ 40 = \$
e. Total \$ e. Total \$

Step 4 Reportable Social Security Benefits as calculated on line 11 of Iowa social security worksheet

B. Spouse/Status 3 A. You or Joint

Step 5 Gross Income

1. Wages, salaries, tips, etc
2. Taxable interest income. If more than \$1,500, complete Sch. B
3. Ordinary dividend income. If more than \$1,500, complete Sch. B
4. Alimony received
5. Business income/(loss). See instructions
6. Capital gain/(loss). See instructions
7. Other gains/(losses). See instructions
8. Taxable IRA distributions
9. Taxable pensions and annuities
10. Rents, royalties, partnerships, estates, etc. See instructions
11. Farm income/(loss). See instructions
12. Unemployment compensation. See instructions
13. Gambling winnings
14. Other income, bonus depreciation, and section 179 adjustment
15. Gross Income. Add lines 1-14
B. Spouse/Status 3
A. You or Joint
B. Spouse/Status 3
A. You or Joint

NOTE: Use only blue or black ink, no pencils or red ink.

Step 6 Adjustments to Income

16. Payments to an IRA, Keogh, or SEP
17. Deductible part of self-employment tax
18. Health insurance premium
19. Penalty on early withdrawal of savings
20. Alimony paid
21. Pension/retirement income exclusion
22. Moving expense deduction. See instructions
23. Iowa capital gain deduction; Include corresponding IA 100 schedule
24. Other adjustments
25. Total adjustments. Add lines 16-24
26. Net Income. Subtract line 25 from line 15

Step 7 Federal Tax Addition and Deduction

27. Federal income tax refund/overpayment received in 2018
28. Self-employment/household employment/other federal taxes
29. Addition for federal taxes. Add lines 27 and 28
30. Total. Add lines 26 and 29
31. Federal tax withheld
32. Federal estimated tax payments made in 2018
33. Additional federal tax paid in 2018 for 2017 and prior years
34. Deduction for federal taxes. Add lines 31, 32, and 33
35. Balance. Subtract line 34 from line 30. Enter here and on line 36, page 2

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		B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
Step 8 Taxable Income	36. BALANCE. From side 1, line 35.....			36.0000
	37. Deduction. Check one box <input type="checkbox"/> Itemized.(Include IA Schedule A) <input type="checkbox"/> Standard <input type="checkbox"/>			37. ....00	....00
	38. TAXABLE INCOME. SUBTRACT line 37 from line 36.....			38. ....00	....00
Step 9 Tax, Credits, and Check- off Contributions	39. Tax from tables or alternate tax.....	39. ....00	▲	....00	
	40. Iowa lump-sum tax. See instructions.....	40. ....00	▲	....00	
	41. Iowa alternative minimum tax. Include IA 6251.....	41. ....00	▲	....00	
	42. Total tax. ADD lines 39, 40, and 41.....	42. ....00		....00	
	43. Total exemption credit amount(s) from Step 3, side 1.....	43. ....00		....00	
	44. Tuition and textbook credit for dependents K-12.....	44. ....00	▲	....00	
	45. Volunteer firefighter/EMS/reserve peace officer credit.....	45. ....00	▲	....00	
	46. Total credits. ADD lines 43, 44, and 45.....	46. ....00		....00	
	47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero.....	47. ....00	▲	....00	
	48. Credit for nonresident or part-year resident. Include IA 126 and federal return.....	48. ....00	▲	....00	
	49. BALANCE. SUBTRACT line 48 from 47. If less than zero, enter zero.....	49. ....00	▲	....00	
	50. Out-of-state tax credit. Include IA 130.....	50. ....00	▲	....00	
	51. BALANCE. SUBTRACT line 50 from 49. If less than zero, enter zero.....	51. ....00	▲	....00	
	52. Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule.....	52. ....00	▲	....00	
	53. BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero.....	53. ....00	▲	....00	
	54. School district surtax or EMS surtax. Take percentage from table; multiply by line 53.....	54. ....00	▲	....00	
	55. Total state and local tax. ADD lines 53 and 54.....	55. ....00	▲	....00	
	56. TOTAL state and local tax before contributions. Combine columns A and B on line 55 and enter here.....	56. ....00		....00	
	57. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.				
	Fish/Wildlife 57a: <input type="checkbox"/> State Fair 57b: <input type="checkbox"/> Firefighters/Veterans 57c: <input type="checkbox"/> Child Abuse Prevention 57d: <input type="checkbox"/> Enter here.....	57. ....00		....00	
	58. TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here.....	58. ....00	▲	....00	
Step 10 Credits	59. Iowa fuel tax credit. Include IA 4136.....	59. ....00	▲	....00	
	60. Check One: Child and dependent care credit <input type="checkbox"/> OR Early childhood development credit <input type="checkbox"/>	60. ....00	▲	....00	
	61. Iowa earned income tax credit. 15.0% (.15) of federal credit.....	61. ....00	▲	....00	
	62. Other refundable credits. Include IA 148 Tax Credits Schedule.....	62. ....00	▲	....00	
	63. Iowa income tax withheld.....	63. ....00	▲	....00	
	64. Estimated and voucher payments made for tax year 2018.....	64. ....00	▲	....00	
	65. TOTAL. ADD lines 59 through 64 and enter here.....	65. ....00	▲	....00	
	66. TOTAL CREDITS. ADD columns A and B on line 65 and enter here.....	66. ....00		....00	
Step 11 Refund	67. If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid.....	67. ....00	▲	....00	
	68. Amount of line 67 to be REFUNDED.....	68. ....00	▲	....00	
	68a. Routing Number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	68b. Type	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	
	68c. Account Number: <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>				
	69. Amount of line 67 to be applied to your 2019 estimated tax.....	69. ....00	▲	....00	
Step 12 Pay	70. If line 66 is less than line 58, subtract line 66 from line 58. This is the AMOUNT OF TAX YOU OWE.....	70. ....00	▲	....00	
	71. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F. Check if annualized income method is used. <input type="checkbox"/>	71. ....00	▲	....00	
	72. Penalty and interest <input type="checkbox"/> 72a. Penalty ....00 <input type="checkbox"/> 72b. Interest ....00 ADD. Enter total.....	72. ....00		....00	
	73. TOTAL AMOUNT DUE. ADD lines 70, 71, and 72. Enter here.....	73. ....00	▲	....00	
Step 13	I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.				
SIGN HERE	Your Signature _____		Date _____	<input type="checkbox"/> Check if Deceased	Date of Death _____
SIGN HERE	Spouse's Signature _____		Date _____	<input type="checkbox"/> Check if Deceased	Date of Death _____
	Preparer's Signature _____		Date _____		
	Preparer's PTIN _____		Firm's FEIN _____		
	Daytime Telephone Number _____			Daytime Telephone Number _____	

This return is due April 30th, 2019. Sign, enclose W-2s, and verify SSNs.
MAILING ADDRESS: Iowa Income Tax Document Processing,
 PO BOX 9187, Des Moines IA 50306-9187
 Make check payable to Treasurer, State of Iowa

Home address, city, state, ZIP

A. You or Joint

41-011a (07/16/2018)