



SCHEDULE
RS
(FORM 40 OR
FORM 40NR)



2023

Alabama Department of Revenue
Retirement Schedule
ATTACH TO FORM 40 OR FORM 40NR

NAME(S) AS SHOWN ON TAX RETURN

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.

Schedule RS must be completed fully and included with your return in order to receive proper credit for your Alabama income tax withheld. Attach a copy of all withholding statements (Form 1099-R) to your return.

| PART I Retirement Distribution(s) Exempt from Alabama Income | | | | | | | | | | |
|--|---|----------------------------|---------------------------|---------------------|-------------------------|-----------------|---------------|-----------------------|-------------------------|--|
| | A FEIN | B IRA | C Distribution Code(s) | D Account Number | E Gross Distribution | F State Code | G State ID | H Alabama Withheld | I Reason Exempt | |
| 1 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 2 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 3 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 4 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 5 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 6 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 7 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 8 | ALABAMA TAX WITHHELD from Retirement Distribution(s) Exempt from Alabama Income. Total lines 1-7, Column H and enter the amount here and Part 5, line 1 | | | | | | | | ● | |
| PART II Primary's Fully or Partially Taxable Retirement Distributions | | | | | | | | | | |
| | A FEIN | B IRA | C Distribution Code(s) | D Account Number | E Gross Distribution | F State Code | G State ID | H Alabama Withheld | I Taxable to Alabama | |
| 1 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 2 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 3 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 4 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 5 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 6 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 7 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 8 | ALABAMA TAX WITHHELD from Retirement Distribution(s) Exempt from Alabama Income. Total lines 1-7, Column H and enter the amount here and Part 5, line 2 | | | | | | | | ● | |
| 9 | RETIREMENT INCOME TAXABLE TO ALABAMA. Total lines 1-7, Column I and enter the amount here | | | | | | | | ● | |
| 10 | RETIREMENT EXCLUSION. Is the primary taxpayer 65 or older and receive taxable retirement? ● <input type="checkbox"/> Yes ● <input type="checkbox"/> No If "Yes", each taxpayer is eligible up to \$6,000 not to exceed the Retirement Income Taxable to Alabama on line 9. If "No", you do not qualify for this exclusion. Stop and go to line 11. (See instructions for more information) | | | | | | | | ● | |
| 11 | Primary's Alabama Taxable Retirement Distribution. Subtract line 10 from line 9. Enter the amount here and on Part 4, line 1 | | | | | | | | ● | |



| PART III Spouse's Fully or Partially Taxable Retirement Distributions | | | | | | | | | | |
|--|---|----------------------------|----------------------|----------------|--------------------|------------|----------|------------------|--------------------|--|
| | A | B | C | D | E | F | G | H | I | |
| | FEIN | IRA | Distribution Code(s) | Account Number | Gross Distribution | State Code | State ID | Alabama Withheld | Taxable to Alabama | |
| 1 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 2 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 3 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 4 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 5 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 6 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 7 | ● | ● <input type="checkbox"/> | ● | ● | ● | ● | ● | ● | ● | |
| 8 | ALABAMA TAX WITHHELD from Retirement Distribution(s) Exempt from Alabama Income. Total lines 1-7, Column H and enter the amount here and Part 5, line 3 | | | | | | | | ● | |
| 9 | RETIREMENT INCOME TAXABLE TO ALABAMA. Total lines 1-7, Column I and enter the amount here | | | | | | | | ● | |
| 10 | RETIREMENT EXCLUSION. Is the spouse 65 or older and receive taxable retirement? ● <input type="checkbox"/> Yes ● <input type="checkbox"/> No If "Yes", each taxpayer is eligible up to \$6,000 not to exceed the Retirement Income Taxable to Alabama on line 9. If "No", you do not qualify for this exclusion. Stop and go to line 11. (See instructions for more information) | | | | | | | | ● | |
| 11 | Spouse's Alabama Taxable Retirement Distribution. Subtract line 10 from line 9. Enter the amount here and on Part 4, line 2 | | | | | | | | ● | |
| PART IV Total Alabama Taxable Retirement Distribution | | | | | | | | | | |
| 1 | Primary's Alabama Taxable Retirement Distribution. Enter the amount from Part 2, line 11 | | | | | | | ● | | |
| 2 | Spouse's Alabama Taxable Retirement Distribution. Enter the amount from Part 3, line 11 | | | | | | | ● | | |
| 3 | Total Alabama Taxable Retirement Distribution. Add lines 1 and 2. Enter the amount here and on Form 40, Page 2, Part 1, Line 4 or Form 40NR, page 2, Part 1, Line 3, Column B | | | | | | | ● | | |
| PART V Alabama Tax Withheld | | | | | | | | | | |
| 1 | Alabama tax withheld from Retirement Distribution(s) Exempt from Alabama Income. Enter the amount from Part 1, line 8 | | | | | | | ● | | |
| 2 | Primary's Alabama tax withheld from a taxable retirement distribution. Enter the amount from Part 2, line 8 | | | | | | | ● | | |
| 3 | Spouse's Alabama tax withheld from a taxable retirement distribution. Enter the amount from Part 3, line 8 | | | | | | | ● | | |
| 4 | Total Alabama Tax Withheld from a 1099-R. Add lines 1, 2, and 3. Enter the amount here and include in the amount on Schedule W-2, line 17 | | | | | | | ● | | |