

2021 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:
a	a
Spouse's last name:	Spouse's first name/middle initial:
a	b a
Current mailing address (number and street, apartment, lot, or suite number) or PO Box:	



City, State, ZIP: _____

Spouse SSN: **490-54-8888** Your SSN: **490-54-9999**

Step 2 Filing Status: Mark one box only

1	Single: Were you claimed as a dependent on another person's Iowa return? Yes ☐ No ☐	Email Address:
2	Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)	Check this box if you or your spouse were 65 or older as of 12/31/21. ☒
3	☒ Married filing separately on this combined return. Spouse use column B.	Residence on 12/31/21: County No. _____ School District No. _____
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.	▲ 1	X \$ 40 = \$ 40.	A. You or Joint	▲ 1	X \$ 40 = \$ 40.
b. Enter 1 for each taxpayer who is 65 or older and/or 1 for each taxpayer who is blind.	▲ 1	X \$ 20 = \$ 20.	A. You or Joint	▲ 1	X \$ 20 = \$ 20.
c. Dependents: Enter 1 for each dependent	▲ 1	X \$ 40 = \$ 40.	A. You or Joint	▲ 0	X \$ 40 = \$ _____
d. Enter first names of dependents here V		e. Total \$ 100.			e. Total \$ 60.

Step 4 Reportable Social Security benefits as calculated on line 13 of Iowa Social Security Worksheet

B. Spouse/Status 3	▲ 9,779.	A. You or Joint	▲ 9,778.
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Step 5 Gross Income	1. Wages, salaries, tips, etc	1.		
	2. Taxable interest income. If more than \$1,500, complete Sch. B	2.	33,101.	33,100.
	3. Ordinary dividend income. If more than \$1,500, complete Sch. B	3.		
	4. Taxable alimony received	4.		
	5. Business income/(loss). See instructions	5.		
	6. Capital gain/(loss). See instructions	6.		
	7. Other gains/(losses). See instructions	7.		
	8. Taxable IRA distributions	8.		
	9. Taxable pensions and annuities	9.	42,344.	42,344.
	10. Rents, royalties, partnerships, estates, etc. See instructions	10.		
	11. Farm income/(loss). See instructions	11.		
	12. Unemployment compensation. See instructions	12.		
	13. Gambling winnings	13.		
	14. Other income, bonus depreciation, and section 179 adjustment	14.		
	15. Gross Income. Add lines 1-14	15.	75,445.▲	75,444.

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

Step 6 Adjust- ments to Income	16. Payments to an IRA, Keogh, or SEP	16.		
	17. Deductible part of self-employment tax	17.		
	18. Health insurance premium	18.		
	19. Penalty on early withdrawal of savings	19.		
	20. Alimony paid	20.		
	21. Pension/retirement income exclusion	21.	6,000.▲	6,000.
	22. Moving expense deduction from federal form 3903	22.		
	23. Iowa capital gain deduction. Must include corresponding IA 100 schedule	23.	▲	
	24. Other adjustments	24.		
	25. Total adjustments. Add lines 16-24.	25.	6,000.▲	6,000.
26. Net Income. Subtract line 25 from line 15	26.	69,445.▲	69,444.	

Step 7 Federal Taxes and Qualified Deductions	27. Federal income tax refund/overpayment received in 2021.	27.	▲	
	28. Self-employment/household employment/other federal taxes	28.	▲	
	29. Addition for federal taxes. Add lines 27 and 28	29.	0.	0.
	30. Total. Add lines 26 and 29	30.	69,445.	69,444.
	31. Federal tax withheld in 2021, federal estimated tax payments made in 2021, and federal taxes paid in 2020 and prior years	31.	12,945.▲	12,945.
	32. Qualified business income deduction. 50.0% (.50) of federal amount. See instructions	32.	▲	
	33. DPAD 199A(g) deduction. 50.0% (.5) of federal amount	33.	▲	
	34. Total federal tax and other qualified deductions. Add lines 31, 32, and 33.	34.	12,945.	12,945.
	35. Balance. Subtract line 34 from line 30. Enter here and on line 36, page 2	35.	56,500.▲	56,499.



a and b a a
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		B. Spouse/Status 3	A. You or Joint	
Step 8	36. BALANCE. From side 1, line 35			
Taxable	37. Deduction. Check one box ☒ Itemized. (Include IA Schedule A) ☐ Standard ☒			
Income	38. TAXABLE INCOME. SUBTRACT line 37 from line 36			
	39. Tax from tables or alternate tax			
	40. Iowa lump-sum tax. See Instructions			
	41. Iowa alternative minimum tax. Must include IA 6251.			
	42. Total tax. ADD lines 39, 40, and 41			
	43. Total exemption credit amount(s) from Step 3, side 1			
	44. Tuition and textbook credit for dependents K-12			
	45. Volunteer firefighter/EMS/reserve peace officer credit			
	46. Total credits. ADD lines 43, 44, and 45			
	47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero.			
	48. Credit for nonresident or part-year resident. Must include IA 126 and federal return			
	49. BALANCE. SUBTRACT line 48 from 47. If less than zero, enter zero			
	50. Out-of-state tax credit. Must include IA 130			
	51. BALANCE. SUBTRACT line 50 from 49. If less than zero, enter zero			
	52. Other nonrefundable Iowa credits. Must include IA 148 Tax Credits Schedule			
	53. BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero			
	54. School district surtax or EMS surtax. Take percentage from table; multiply by line 53.			
	55. Total state and local tax. ADD lines 53 and 54			
	56. TOTAL state and local tax before contributions. Combine columns A and B on line 55 and enter here			
	57. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.			
	Fish/Wildlife 57a: ☐ State Fair 57b: ☐ Firefighters/Veterans 57c: ☐ Child Abuse Prevention 57d: ☐ Enter here			
	58. TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here.			
Step 10	59. Iowa Fuel Tax Credit. Must include IA 4136			
Credits	60. Check One: ☐ Child and Dependent Care Credit ☐ OR ☐ Early Childhood Development Credit			
	61. Iowa earned income tax credit. 15.0% (.15) of federal credit			
	62. Other refundable credits. Include IA 148 Tax Credits Schedule			
	63. Iowa income tax withheld			
	64. Estimated and voucher payments made for tax year 2021			
	65. TOTAL. ADD lines 59 through 64 and enter here			
	66. TOTAL CREDITS. ADD columns A and B on line 65 and enter here			
Step 11	67. If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid			
Refund	68. Amount of line 67 to be REFUNDED			
	68a. Routing number:			
	68b. Type ☐ Checking ☐ Savings			
	68c. Account number:			
	69. Amount of line 67 to be applied to your 2022 estimated tax			
Step 12	70. If line 66 is less than line 58, subtract line 66 from line 58. This is the AMOUNT OF TAX YOU OWE			
Pay	71. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F. Check if annualized income method is used. ☐			
	72. Penalty and interest ☐ 72a. Penalty ☐ 72b. Interest ☐ ADD. Enter total			
	73. TOTAL AMOUNT DUE. ADD lines 70, 71, and 72. Enter here			
Step 13	I, the undersigned, declare under penalties of perjury or false certificate, that I have examined this return, and, to the best of my knowledge and belief, it is true, correct, and complete.			
SIGN	☐		☐	
HERE	Your signature	Date	Preparer's signature	Date
SIGN	☐		☐	
HERE	Spouse's signature	Date	Preparer's PTIN	Firm's FEIN
	Daytime telephone number		Daytime telephone number	

This return is due May 2nd, 2022. 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 Iowa Department of Revenue

