



Alabama Individual Income Tax Return RESIDENTS & PART-YEAR RESIDENTS

For the year Jan. 1 - Dec. 31, 2016, or other tax year: Beginning: Ending:

Personal information fields: Your first name, Spouse's first name, Present home address, City, town or post office, State, ZIP code, Foreign Country.

Social Security Number fields: Your social security number, Primary's deceased date, Spouse's social security number, Spouse's deceased date.

CHECK BOX IF AMENDED RETURN ADOR

Filing Status/ Exemptions: 1 \$1,500 Single, 2 \$3,000 Married filing joint, 3 \$1,500 Married filing separate, 4 \$3,000 Head of Family.

Income and Adjustments table with columns for Alabama tax withheld (A) and Income (B), rows 5a-10.

Deductions table with columns for Alabama tax withheld (A) and Income (B), rows 11-15. Includes instructions for itemized vs standard deduction.

Tax table with columns for Alabama tax withheld (A) and Income (B), rows 16-21. Includes Alabama Election Campaign Fund.

Payments table with columns for Alabama tax withheld (A) and Income (B), rows 22-29. Includes estimated tax payments and refundable portions.

AMOUNT YOU OWE: Line 30, 31. Includes estimated tax penalty.

OVERPAID: Line 32, 33. Includes amount of line 32 to be applied to 2017 estimated tax.

Donations: Line 34. Total Donation Check-offs from Schedule DC.

REFUND: Line 35. REFUNDED TO YOU. Subtract lines 33 and 34 from line 32.



**PART I**

1	Alimony received	1	●	00
2	Business income or (loss) (attach Federal Schedule C or C-EZ) (see instructions)	2	●	00
3	Gain or (loss) from sale of Real Estate, Stocks, Bonds, etc. (attach Schedule D)	3	●	00
4a	Total IRA distributions	4a	●	00
4b	Taxable amount (see instructions)	4b	●	00
5a	Total pensions and annuities	5a	●	00
5b	Taxable amount (see instructions)	5b	●	00
6	Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)	6	●	00
7	Farm income or (loss) (attach Federal Schedule F)	7	●	00
8	Other income (state nature and source — see instructions)	8	●	00
9	<b>Total other income.</b> Add lines 1 through 8. Enter here and also on page 1, line 7.	9	●	00

**PART II**

1a	Your IRA deduction	1a	●	00
b	Spouse's IRA deduction	1b	●	00
2	Payments to a Keogh retirement plan and self-employment SEP deduction	2	●	00
3	Penalty on early withdrawal of savings	3	●	00
4	Alimony paid. Recipient's last name _____ Social security no. ● _____	4	●	00
5	Adoption expenses	5	●	00
6	Moving Expenses (Attach Federal Form 3903) to City _____ State _____ ZIP _____	6	●	00
7	Self-employed health insurance deduction	7	●	00
8	Payments to Alabama College Counts 529 Fund or Alabama PACT Program	8	●	00
9	Health insurance deduction for small employer employee (see instructions)	9	●	00
10	Costs to retrofit or upgrade home to resist wind or flood damage	10	●	00
11	Deposits to a catastrophe savings account	11	●	00
12	<b>Total adjustments.</b> Add lines 1 through 11. Enter here and also on page 1, line 9	12	●	00

**PART III**

**Dependents**

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 one-half dependent's support?
●					
●					
●					
●					

Do not include yourself or your spouse

b Total number of dependents claimed above \_\_\_\_\_ ●   

2 **Amount allowed.** (Multiply the total number of dependents claimed on line 1b by the amount from the dependent chart on page 10.)  
Enter amount here and on page 1, line 14. \_\_\_\_\_ 2 ● 00

**PART IV**

**General Information**

1 **Residency** Check only one box  Full Year  Part Year From \_\_\_\_\_ 2016 through \_\_\_\_\_ 2016.

2 Did you file an Alabama income tax return for the year 2015?  Yes  No If no, state reason \_\_\_\_\_

3 Give name and address of present employer(s). Yours \_\_\_\_\_  
Your Spouse's \_\_\_\_\_

4 Enter the Federal Adjusted Gross Income ●\$ \_\_\_\_\_ and Federal Taxable Income ●\$ \_\_\_\_\_ as reported on your 2016 Federal Individual Income Tax Return.

5 Do you have income which is reported on your Federal return, but not reported on your Alabama return (other than your state tax refund)?  Yes  No  
If yes, enter source(s) and amount(s) below: (other than state income tax refund)

Source _____	Amount ●	00
Source _____	Amount ●	00

**Drivers License Info**

DOB (mm/dd/yyyy) ● _____	Your state ● _____	DL# ● _____	Iss date (mm/dd/yyyy) ● _____	Exp date (mm/dd/yyyy) ● _____
DOB (mm/dd/yyyy) ● _____	Spouse state ● _____	DL# ● _____	Iss date (mm/dd/yyyy) ● _____	Exp date (mm/dd/yyyy) ● _____

**Sign Here In Black Ink**

I authorize a representative of the Department of Revenue to discuss my return and attachments with my preparer.

**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.

Keep a copy of this return for your records.	Your signature _____	Date _____	Daytime telephone number ( ) _____	Your occupation _____
	Spouse's signature (if joint return, BOTH must sign) _____	Date _____	Daytime telephone number ( ) _____	Spouse's occupation _____

**Paid Preparer's Use Only**

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 _____	Daytime telephone no. ( ) _____	E.I. No. _____	ZIP Code _____

**WHERE TO FILE FORM 40**

<b>If you are <u>not</u> making a payment, mail your return to:</b>	<b>If you are making a payment, mail your return, Form 40V, and payment to:</b>
Alabama Department of Revenue P.O. Box 154 Montgomery, AL 36135-0001	Alabama Department of Revenue P.O. Box 2401 Montgomery, AL 36140-0001

Mail **only** your 2016 Form 40 to one of the above addresses. Prior year returns, amended returns, and all other correspondence should be mailed to Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.

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