

40701

9998

Utah State Tax Commission
Utah Individual Income Tax Return
 All State Income Tax Dollars Fund Education

2017
TC-40

• Amended Return - enter code: _____ (code 1 - 5 from instructions)

Full-yr Resident?

Your Social Security No. Your first name Your last name Y/N

Spouse's Soc. Sec. No. Spouse's first name Spouse's last name

Address Telephone number

If deceased, complete page 3, Part 1

City State ZIP+4 Foreign country (if not U.S.)

1 Filing Status - enter code

- 1 = Single
- _____ 2 = Married filing jointly
- 3 = Married filing separately
- 4 = Head of household
- 5 = Qualifying widow(er)

If using code 2 or 3, enter spouse's name and SSN above

• 2 Exemptions - enter number

- a _____ Yourself*
- b _____ Spouse*
- c _____ Dependents*
- d _____ Dependents with a disability
- e _____ Total exemptions (add a through d)

* from federal return

3 Election Campaign Fund

Does not increase your tax or reduce your refund.
 Enter the code for the Yourself Spouse
 party of your choice. • _____ • _____
 See instructions for
 code letters or go to incometax.utah.gov/elect.
 If no contribution, enter **N**.

4	Federal adjusted gross income from federal return	• 4	_____	.00
5	Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)	• 5	_____	.00
6	Total income - add line 4 and line 5	6	_____	.00
7	State tax refund included on federal form 1040, line 10, if any	• 7	_____	.00
8	Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	_____	.00
9	Utah taxable income (loss) - subtract the sum of lines 7 and 8 from line 6	• 9	_____	.00
10	Utah tax - multiply line 9 by 5% (.05) (not less than zero)	• 10	_____	.00
11	Exemption amount - multiply line 2e by \$3,038 (if line 4 over \$156,900, see instr.)	• 11	_____	.00
12	Federal standard or itemized deductions	• 12	_____	.00
13	Add line 11 and line 12	13	_____	.00
14	State income tax deducted on federal Schedule A, line 5, if any	• 14	_____	.00
15	Subtract line 14 from line 13	15	_____	.00
16	Initial credit before phase-out - multiply line 15 by 6% (.06)	• 16	_____	.00
17	Enter: \$13,978 (if single or married filing separately); \$20,968 (if head of household); or \$27,956 (if married filing jointly or qualifying widower)	• 17	_____	.00
18	Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	_____	.00
19	Phase-out amount - multiply line 18 by 1.3% (.013)	• 19	_____	.00
20	Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)	• 20	_____	.00
21	If you are a qualified exempt taxpayer, enter "X" (complete worksheet in instr.)	• 21	_____	
22	Utah income tax - subtract line 20 from line 10 (not less than zero)	• 22	_____	.00

Electronic filing is quick, easy and free, and will speed up your refund.

To learn more, go to tap.utah.gov

Utah Individual Income Tax Return (continued)

**TC-40
2017**

40702 SSN _____ Last name _____

23	Enter tax from TC-40, page 1, line 22	23	_____	.00
24	Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)	• 24	_____	.00
25	Full-year resident, subtract line 24 from line 23 (not less than zero) Non or Part-year resident, enter the tax from TC-40B, line 38	• 25	_____	.00
26	Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)	• 26	_____	.00
27	Subtract line 26 from line 25 (not less than zero)	27	_____	.00
28	Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)	• 28	_____	.00
29	AMENDED RETURN ONLY - previous refund	• 29	_____	.00
30	Recapture of low-income housing credit	• 30	_____	.00
31	Utah use tax	• 31	_____	.00
32	Total tax, use tax and additions to tax (add lines 27 through 31)	32	_____	.00
33	Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1)	• 33	_____	.00
34	Credit for Utah income taxes prepaid from TC-546 and 2016 refund applied to 2017	• 34	_____	.00
35	Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2)	• 35	_____	.00
36	Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2)	• 36	_____	.00
37	AMENDED RETURN ONLY - previous payments	• 37	_____	.00
38	Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)	• 38	_____	.00
39	Total withholding and refundable credits - add lines 33 through 38	39	_____	.00
40	TAX DUE - subtract line 39 from line 32 (not less than zero)	• 40	_____	.00
41	Penalty and interest (see instructions)	41	_____	.00
42	TOTAL DUE - PAY THIS AMOUNT - add line 40 and line 41	• 42	_____	.00
43	REFUND - subtract line 32 from line 39 (not less than zero)	• 43	_____	.00
44	Voluntary subtractions from refund (not greater than line 43) Enter the total from page 3, Part 5	• 44	_____	.00
45	DIRECT DEPOSIT YOUR REMAINING REFUND - provide account information (see instructions for foreign accounts)	checking	savings	
	• Routing number _____ • Account number _____	Account type:	• _____ • _____	

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules are true, correct and complete.

SIGN Your signature	Date	Spouse's signature (if filing jointly)	Date
HERE			

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN • _____
Paid Preparer's Section	Preparer's signature	Date	Preparer's PTIN • _____
	Firm's name and address		Preparer's EIN • _____

Attach TC-40 page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, want to deposit into a UESP account, want to apply all/part of your refund to next year's taxes, want to send a direct deposit to a foreign account, or no longer qualify for a homeowner's exemption.

SSN _____

Last name _____

Part 1 - Deceased Taxpayer Information

- If the taxpayer shown on page 1 is deceased, enter the date of death here: • / /
mm/dd/yy
- If the spouse shown on page 1 is deceased, enter the date of death here: • / /
mm/dd/yy
- If you are claiming a refund for a deceased taxpayer and are not the surviving spouse, enter "X": • _____
You must complete and attach form TC-131 to the return.

Part 2 - Fiscal Year Filer

- If filing a fiscal year return (a year other than January 1 through December 31), enter the fiscal year end (mm/yy) • /
See incometax.utah.gov/topics/fiscal-year-filing. mm/yy

Part 3 - Federal Form 8886 filed

- If you filed federal form 8886, *Reportable Transaction Disclosure Statement*, enter "X": • _____
Get form and instructions at irs.gov.

Part 4 - Voluntary Contributions (write the code and amount of each voluntary contribution)

See explanation of each contribution at incometax.utah.gov/contributions and/or the TC-40 instructions

	Code	Amount	Sch Dist Code
02 Pamela Atkinson Homeless Account			
03 Kurt Oscarson Children's Organ Transplant Account			
05 School District and Nonprofit School District Foundation - enter school district code	• _____	.00	_____
See instructions for school district codes, or get codes at			
incometax.utah.gov/contributions/school-districts	• _____	.00	_____
15 Clean Air Fund			
	• _____	.00	_____
	• _____	.00	_____
Total voluntary contributions (enter the total here and on TC-40, page 2, line 28):		.00	

Part 5 - Voluntary Subtractions from Refund

- 1. Enter the amount of your refund you want deposited into your **Utah Educational Savings Plan (UESP)** account(s): • 1 _____ .00
See instructions. Also see uesp.org, or call 1-800-418-2551.
- 2. Enter the amount of your refund you want applied to your **2018 taxes**: • 2 _____ .00
- Total voluntary subtractions** (enter the total here and on TC-40, page 2, line 44): _____ .00
May not be greater than the amount on line 43.

Part 6 - Direct Deposit to Foreign Account

- If you choose to direct deposit your refund to an account outside the United States and its territories, enter "X": • _____
The Tax Commission cannot transfer a refund to an account outside the United States and its territories.
By checking this box, your refund will not be direct deposited but will be sent to you by check.

Part 7 - Property Owner's Residential Exemption Termination Declaration

- If you are a Utah residential property owner and declare you no longer qualify to receive a residential exemption authorized under UC §59-2-103 for your primary residence, enter "X" and enter the county code where the residence is located (see instructions for county codes and additional information). • _____ Enter "X"
- _____ Enter code

Mail RETURNS WITH PAYMENTS to: Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0266

Mail ALL OTHER RETURNS to: Utah State Tax Commission
210 N 1950 W
Salt Lake City, UT 84134-0260

Submit page ONLY if data entered.
Attach completed schedule to your Utah Income Tax return.