

Retirement Credit Schedule

Your last name

Your social security number

You

Spouse

Part 1 - Taxpayer Information

1. Date of birth (if born after 1952, you do not qualify for credit) (mmddyy) ● ●

Part 2 - Age 65 or Older - Credit

You

Spouse

2. Check box if you were age 65 or older by December 31, 2009 — —

3. Enter total number of boxes checked on line 2 —

4. Multiply the number on line 3 by \$450 — .00

Part 3 - Under Age 65 - Retirement Income Credit

You

Spouse

5. Check box if you were under age 65 and born before January 1, 1953 — —

6. If you checked a box on line 5, enter \$288 in the same column, otherwise enter "0"0000

7. Enter total qualified retirement income for taxpayer checked on line 5 (see inst.)0000

8. Multiply the amount on line 7 for each column by 6% (.06)0000

9. Enter the lesser of line 6 or line 8 for each column0000

10. Enter total of both columns of line 9 — .00

Part 4 - Calculation of Credit

11. Add line 4 and line 10 — .00

12. Enter total income from your TC-40, line 6 — .00

13. Enter nontaxable interest received (federal form 1040 or 1040A, line 8b) (see inst.) — .00

14. Modified adjusted gross income (add line 12 and line 13) — .00

15. Enter: \$16,000, if married filing separately
 \$25,000, if single
 \$32,000, if married filing jointly or qualifying widow(er)
 \$32,000, if head of household } — .00

16. Subtract line 15 from line 14 - if less than zero, enter "0"
 If line 16 is zero, enter "0" on line 17, then go to line 18 — .00

17. Multiply line 16 by 2.5% (.025) — .00

18. Retirement Credit - subtract line 17 from line 11 - if less than zero, enter "0"
 Enter this amount on your TC-40A, Part 3, using code 18 — .00

Attach completed schedule to your 2009 Utah income tax return.