

40601

9998

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

2016
TC-40

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

Your Social Security No.	Your first name	Your last name	If deceased, complete page 3, Part 1
Spouse's Soc. Sec. No.	Spouse's first name	Spouse's last name	
Address		Telephone number	
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) <small>If using code 2 or 3, enter spouse's name and SSN above</small>	• 2 Exemptions - enter number a _____ Yourself* b _____ Spouse* c _____ Dependents* d _____ Dependents with a disability e _____ Total exemptions (add a through d) <small>* from federal return</small>	3 Election Campaign Fund - enter code <small>Does not increase your tax or reduce your refund</small> C = Constitution D = Democratic Yourself Spouse M = Independent American • _____ • _____ L = Libertarian R = Republican N = No contribution
---	---	--

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 \$155,650, 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: \$13,867 (if single or married filing separately); \$20,801 (if head of household); or \$27,734 (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 taxexpress.utah.gov

Utah Individual Income Tax Return (continued)

**TC-40
2016**

40602 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 2015 refund applied to 2016	• 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.

Income Tax Supplemental Schedule

**TC-40A
2016**

40604

SSN _____

Last name _____

Part 1 - Additions to Income (write the code and amount of each addition to income)		Code	Amount
Code	Code	• _____	_____ .00
51 Lump sum distributions	57 Municipal bond interest	• _____	_____ .00
53 Medical Savings Account (MSA) addback*	60 Untaxed income of a resident trust	• _____	_____ .00
54 Utah Educational Savings Plan (UESP) addback*	61 Untaxed income of a nonresident trust	• _____	_____ .00
56 Child's income excluded from parent's return	69 Equitable adjustments	• _____	_____ .00
* to the extent previously deducted or credited on Utah return		• _____	_____ .00
		• _____	_____ .00
		• _____	_____ .00
Total additions to income (add all additions to income and enter total here and on TC-40, line 5)			_____ .00

Part 2 - Subtractions from Income (write the code and amount of each subtraction from income)		Code	Amount
Code	Code	• _____	_____ .00
71 Interest from U.S. Government Obligations	78 Railroad retirement income	• _____	_____ .00
77 Native American Income: Tribe	79 Equitable adjustments	• _____	_____ .00
Enrollment Number Code	82 Nonresident active duty military pay	• _____	_____ .00
Yours • _____	85 State tax refund distributed to beneficiary	• _____	_____ .00
Spouse's • _____	88 Nonresident military spouse income	• _____	_____ .00
		• _____	_____ .00
		• _____	_____ .00
Total subtractions from income (add all subtractions from income and enter total here and on TC-40, line 8)			_____ .00

Part 3 - Apportionable Nonrefundable Credits (write the code and amount of each credit)		Code	Amount
Code	Code	• _____	_____ .00
04 Capital gain transactions credit	22 Medical Care Savings Account (MSA) credit	• _____	_____ .00
18 Retirement tax credit (attach TC-40C)	23 Health benefit plan credit	• _____	_____ .00
20 Utah Educational Savings Plan (UESP) credit	24 Qualifying solar project credit	• _____	_____ .00
	26 Gold and silver coin sale credit	• _____	_____ .00
		• _____	_____ .00
		• _____	_____ .00
Total apportionable nonrefundable credits (add all Part 3 credits and enter total here and on TC-40, line 24)			_____ .00

Part 4 - Nonapportionable Nonrefundable Credits (write the code and amount of each credit)		Code	Amount
Code	Code	• _____	_____ .00
01 At-home parent credit	13 Carryforward of mach./equip. research credit	• _____	_____ .00
02 Qualified sheltered workshop credit - name: _____	17 Tax paid to another state (attach TC-40S)	• _____	_____ .00
	19 Live organ donation expenses credit	• _____	_____ .00
05 Clean fuel vehicle credit	21 Renewable residential energy systems credit	• _____	_____ .00
06 Historic preservation credit	25 Combat related death credit	• _____	_____ .00
07 Carryforward of enterprise zone credit	27 Veteran employment tax credit	• _____	_____ .00
08 Low-income housing credit	28 Employing persons who are homeless	• _____	_____ .00
10 Recycling market dev. zone credit	63 Achieving a Better Life Experience Prog. credit	• _____	_____ .00
12 Research activities credit			
Total nonapportionable nonrefundable credits (add all Part 4 credits and enter total here and on TC-40, line 26)			_____ .00

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

Income Tax Supplemental Schedule

**TC-40A
2016**

40605

SSN _____

Last name _____

Part 5 - Refundable Credits (write the code and amount of each refundable credit)

Code	Code	Code	Amount
		•	_____ .00
39 Renewable commercial energy systems	47 Agricultural off-highway gas/undyed diesel		_____
40 Targeted business tax credit	48 Farm operation hand tools	•	_____ .00
41 Special needs adoption credit		•	_____ .00
		•	_____ .00
		•	_____ .00
		•	_____ .00
Total refundable credits (add all refundable credits and enter total here and on TC-40, line 38)			_____ .00

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

Line Explanations	IMPORTANT
1 Employer/payer ID number from W-2 box "b" or 1099 2 Utah withholding ID number from W-2 box "15" or 1099 (14 characters, ending in WTH, no hyphens) 3 Employer/payer name and address from W-2 box "c" or 1099 4 Enter "X" if reporting Utah withholding from form 1099 5 Employee's Social Security number from W-2 box "a" or 1099 6 Utah wages or income from W-2 box "16" or 1099 7 Utah withholding tax from W-2 box "17" or 1099	<p>Do not send your W-2s or 1099s with your return. Instead enter W-2 or 1099 information below, but only if there is Utah withholding on the form.</p> <p>Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax.</p> <p>Enter mineral production withholding from TC-675R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.</p>
<p>First W-2 or 1099</p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00	<p>Second W-2 or 1099</p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00
<p>Third W-2 or 1099</p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00	<p>Fourth W-2 or 1099</p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00

Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33: _____ .00

Submit page ONLY if data entered.
Attach completed schedule to your Utah Income Tax Return.
Do not attach W-2s or 1099s to your Utah return.

Mineral Production and Pass-through Withholding

**TC-40W
2016**

40610

SSN _____

Last name _____

Part 2 -Utah Mineral Production Withholding Tax - TC-675R

Do not send TC-675R or Utah Schedules K-1 with return. Enter TC-675R or Schedule K-1 information below. Use additional TC-40Ws if needed.

Line Explanations

- | | |
|---|--|
| 1 Producer's EIN from box "2" of TC-675R | 4 Pass-through entity EIN if credit from partnership or S corporation (enter EIN from Utah Schedule K-1) |
| 2 Producer's name from box "1" of TC-675R | 5 Utah mineral production withholding tax from box"6" of TC-675R or from Utah Schedule K-1. |
| 3 Producer's Utah withholding number from box "3" of TC-675R (14 characters, ending in WMP, no hyphens) | |

First TC-675R or Utah Schedule K-1	Second TC-675R or Utah Schedule K-1
1 _____	1 _____
2 _____	2 _____
3 _____ (14 characters, no hyphens)	3 _____ (14 characters, no hyphens)
4 _____	4 _____
5 _____ .00	5 _____ .00
Third TC-675R or Utah Schedule K-1	Fourth TC-675R or Utah Schedule K-1
1 _____	1 _____
2 _____	2 _____
3 _____ (14 characters, no hyphens)	3 _____ (14 characters, no hyphens)
4 _____	4 _____
5 _____ .00	5 _____ .00

Enter total mineral production withholding tax from all lines 5 here and on TC-40, page 2, line 36. _____ .00

Part 3 -Utah Pass-through Entity Taxpayer Withholding - Utah Schedule K-1

Do not send Utah Schedule(s) K-1 with return. Enter information below. Use additional TC-40Ws if needed.

Line Explanations

- 1 Pass-through entity EIN from Utah Schedule K-1 box "A"
- 2 Name of pass-through entity from Utah Schedule K-1 box "B"
- 3 Utah withholding tax paid by pass-through entity

First Utah Schedule K-1	Second Utah Schedule K-1
1 _____	1 _____
2 _____	2 _____
3 _____ .00	3 _____ .00
Third Utah Schedule K-1	Fourth Utah Schedule K-1
1 _____	1 _____
2 _____	2 _____
3 _____ .00	3 _____ .00

Enter total pass-through withholding tax from all lines 3 here and on TC-40, page 2, line 35: _____ .00

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