

40501

9998

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

**2015  
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.)			

<b>1 Filing Status - enter code</b> 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>	<b>• 2 Exemptions - enter number</b> a _____ Yourself* b _____ Spouse* c _____ Dependents* d _____ Dependents with a disability e _____ Total exemptions (add a through d) <small>* from federal return</small>	<b>3 Election Campaign Fund - enter code</b> <small>Does not increase your tax or reduce your refund</small> <b>C</b> = Constitution <b>D</b> = Democratic      Yourself      Spouse <b>M</b> = Independent American    • _____    • _____ <b>L</b> = Libertarian <b>R</b> = Republican <b>N</b> = No contribution
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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 <b>Utah taxable income (loss)</b> - subtract the sum of lines 7 and 8 from line 6	•	9	.00
10 <b>Utah tax</b> - multiply line 9 by 5% (.05) (not less than zero)	•	10	.00
11 Exemption amount - multiply line 2e by \$3,000 (if line 4 over \$154,950, 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: <b>\$13,805</b> (if single or married filing separately); <b>\$20,707</b> (if head of household); or <b>\$27,610</b> (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 <b>Utah income tax</b> - 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  
2015**

40502 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 2014 refund applied to 2015 • 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 Amount of refund on line 43 to be applied to your 2016 taxes • 44 \_\_\_\_\_ .00
- 45 **DIRECT DEPOSIT YOUR 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 telephone number	Preparer's PTIN • _____
	Firm's name and address		Preparer's EIN • _____

Attach TC-40 page 3 if you are filing for a deceased taxpayer, filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, requesting a direct deposit to be sent to your Utah Educational Savings Plan, requesting a direct deposit to be sent to a foreign account, or are no longer entitled to a homeowner's exemption.



**Income Tax Supplemental Schedule**

**TC-40A  
2015**

40504

SSN \_\_\_\_\_

Last name \_\_\_\_\_

<b>Part 1 - Additions to Income</b> (write the code and amount of each addition to income)		<b>Code</b>	<b>Amount</b>
<b>Code</b>	<b>Code</b>	• _____	_____ .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
Total additions to income (add all additions to income and enter total here and on TC-40, line 5)			_____ .00

<b>Part 2 - Subtractions from Income</b> (write the code and amount of each subtraction from income)		<b>Code</b>	<b>Amount</b>
<b>Code</b>	<b>Code</b>	• _____	_____ .00
71 Interest from U.S. Government Obligations	78 Railroad retirement income	• _____	_____ .00
77 Native American Income: <b>Tribe</b>	79 Equitable adjustments	• _____	_____ .00
<b>Enrollment Number</b> <b>Code</b>	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

<b>Part 3 - Apportionable Nonrefundable Credits</b> (write the code and amount of each credit)		<b>Code</b>	<b>Amount</b>
<b>Code</b>	<b>Code</b>	• _____	_____ .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
		• _____	_____ .00
		• _____	_____ .00
Total apportionable nonrefundable credits (add all Part 3 credits and enter total here and on TC-40, line 24)			_____ .00

<b>Part 4 - Nonapportionable Nonrefundable Credits</b> (write the code and amount of each credit)		<b>Code</b>	<b>Amount</b>
<b>Code</b>	<b>Code</b>	• _____	_____ .00
01 At-home parent credit	12 Research activities credit	• _____	_____ .00
02 Qualified sheltered workshop credit - name: _____	13 Carryover of mach./equip. research credit	• _____	_____ .00
	17 Tax paid to another state (attach TC-40S)	• _____	_____ .00
05 Clean fuel vehicle credit	19 Live organ donation expenses credit	• _____	_____ .00
06 Historic preservation credit	21 Renewable residential energy systems credit	• _____	_____ .00
07 Enterprise zone credit	25 Combat related death credit	• _____	_____ .00
08 Low-income housing credit	27 Veteran employment tax credit	• _____	_____ .00
10 Recycling market dev. zone credit	28 Employing persons who are homeless	• _____	_____ .00
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  
2015**

40505

SSN \_\_\_\_\_

Last name \_\_\_\_\_

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

<b>Code</b>	<b>Code</b>	<b>Code</b>	<b>Amount</b>
		• _____	_____ .00
<b>39</b> Renewable commercial energy systems	<b>47</b> Agricultural off-highway gas/undyed diesel	• _____	_____ .00
<b>40</b> Targeted business tax credit	<b>48</b> Farm operation hand tools	• _____	_____ .00
<b>41</b> 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

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**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 <b>(14 characters, ending in WTH, no hyphens)</b> 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><b>Do not send your W-2s or 1099s with your return.</b> Instead enter W-2 or 1099 information below, but <b>only</b> 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><b>First W-2 or 1099</b></p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00	<p><b>Second W-2 or 1099</b></p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00
<p><b>Third W-2 or 1099</b></p> 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00	<p><b>Fourth W-2 or 1099</b></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  
2015**

40510

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.**