

Last name

SSN

Part 1 - Taxpayer Information

You

Spouse

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

Part 2 - Age 65 or Over - Credit

- 2 Enter "X" in 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

Part 3 - Under Age 65 - Retirement Income Credit

- 5 Enter "X" 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
- 7 Enter total qualified retirement income for taxpayer checked on line 5
- 8 Multiply the amount on line 7 for each column by 6% (.06)
- 9 Enter the lesser of line 6 or line 8 for each column
- 10 Enter the total of both columns of line 9

Part 4 - Calculation of Credit

- 11 Add lines 4 and 10
- 12 Enter total income from your TC-40, line 6
- 13 Enter nontaxable interest income (federal form 1040 or 1040A, line 8b)
- 14 Modified adjusted gross income (add lines 12 and 13)
- 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
- 16 Subtract line 15 from line 14 - if less than zero, enter "0"
- 17 Multiply line 16 by 2.5% (.025)
- 18 Retirement Credit (subtract line 17 from line 11 - if less than zero, enter "0")
Enter this amount on TC-40A, Part 3, using code 18

Attach completed schedule to your 2009 Utah Income Tax return