

# Retirement Tax Credit Schedule

Your last name

Your social security number

	You	Spouse
<b>Part 1 - Taxpayer Information</b>		
1. Date of birth (if born after 1952, you do not qualify for credit) .....	● <u>    </u> / <u>    </u> / <u>    </u> ●	● <u>    </u> / <u>    </u> / <u>    </u> ●
	mm    dd    yy	mm    dd    yy
<b>Part 2 - Age 65 or Older - Credit</b>		
2. Enter "X" if you were age 65 or older by December 31, 2011 .....	—	—
3. Enter total number of X's on line 2 .....	_____	_____
4. Multiply the number on line 3 by \$450 .....	_____	_____
		.00
<b>Part 3 - Under Age 65 - Retirement Income Credit</b>		
5. Enter "X" if you were under age 65 and born before January 1, 1953 .....	—	—
6. If you entered an "X" on line 5, enter \$288 in the same column, otherwise enter "0" .....	_____	_____
	.00	.00
7. Enter total qualified retirement income for taxpayer checked on line 5 (see inst.) .....	_____	_____
	.00	.00
8. Multiply the amount on line 7 for each column by 6% (.06) .....	_____	_____
	.00	.00
9. Enter the lesser of line 6 or line 8 for each column .....	_____	_____
	.00	.00
10. Enter total of line 9 for both columns .....	_____	_____
		.00
<b>Part 4 - Calculation of Credit</b>		
11. Add line 4 and line 10 .....		.00
12. Enter total income from your TC-40, line 6 .....	_____	.00
13. Enter nontaxable interest income (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

**Submit this page ONLY if data entered.  
Attach completed schedule to your 2011 Utah income tax return.**