

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.)

<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 \$3,038 (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: <b>\$13,867</b> (if single or married filing separately); <b>\$20,801</b> (if head of household); or <b>\$27,734</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

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**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 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, 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.

**Part 1 - Deceased Taxpayer Information**

If the taxpayer shown on page 1 is deceased, enter the date of death here: •      /      /       
 mm/dd/yy

If the spouse shown on page 1 is deceased, enter the date of death here: •      /      /       
 mm/dd/yy

If you are claiming a refund for a deceased taxpayer and are not the surviving spouse, enter "X": • \_\_\_\_\_  
 You must complete and attach form TC-131 to the return.

**Part 2 - Fiscal Year Filer**

If filing a fiscal year return (a year other than January 1 through December 31), enter the fiscal year end (mm/yy) •      /       
 See [incometax.utah.gov/topics/fiscal-year-filing](http://incometax.utah.gov/topics/fiscal-year-filing). mm/yy

**Part 3 - Federal Form 8886 filed**

If you filed federal form 8886, *Reportable Transaction Disclosure Statement*, enter "X": • \_\_\_\_\_  
 Get form and instructions at [irs.gov](http://irs.gov).

**Part 4 - Voluntary Contributions** (write the code and amount of each voluntary contribution)

See explanation of each contribution at [incometax.utah.gov/contributions](http://incometax.utah.gov/contributions) and/or the TC-40 instructions

	<b>Code</b>	<b>Amount</b>	<b>Sch Dist Code</b>
02 Pamela Atkinson Homeless Account			
03 Kurt Oscarson Children's Organ Transplant Account			
05 School District and Nonprofit School District Foundation - enter school district code	• _____	.00	_____
See codes at <a href="http://incometax.utah.gov/contributions/school-district-contributions">incometax.utah.gov/contributions/school-district-contributions</a>			
11 Canine Body Armor Account	• _____	.00	_____
12 Invest More for Education Account			
13 Youth Development Organization Account	• _____	.00	_____
14 Youth Character Organization Account	• _____	.00	_____
<b>Total voluntary contributions</b> (enter the total here and on TC-40, page 2, line 28):		.00	_____

**Part 5 - Voluntary Subtractions from Refund**

1. Enter the amount of your refund you want deposited into your **Utah Educational Savings Plan (UESP)** account(s): • 1 \_\_\_\_\_ .00  
 See instructions. Also see [uesp.org](http://uesp.org), or call 801-321-7188 or 1-800-418-2551.

2. Enter the amount of your refund you want applied to your **2017 taxes**: • 2 \_\_\_\_\_ .00

**Total voluntary subtractions** (enter the total here and on TC-40, page 2, line 44): \_\_\_\_\_ .00  
*May not be greater than the amount on line 43.*

**Part 6 - Direct Deposit to Foreign Account**

If you choose to direct deposit your refund to an account outside the United States and its territories, enter "X": • \_\_\_\_\_  
 The Tax Commission cannot transfer a refund to an account outside the United States and its territories.  
 By checking this box, your refund will not be direct deposited but will be sent to you by check.

**Part 7 - Property Owner's Residential Exemption Termination Declaration**

If you are a Utah residential property owner and declare you no longer qualify to receive a residential exemption authorized under UC §59-2-103 for your primary residence, enter "X" and enter the county code where the residence is located (see instructions for county codes and additional information). • \_\_\_\_\_ Enter "X"  
 • \_\_\_\_\_ Enter code

Mail RETURNS WITH PAYMENTS to:  Utah State Tax Commission  
 210 N 1950 W  
 Salt Lake City, UT 84134-0266

Mail ALL OTHER RETURNS to:  Utah State Tax Commission  
 210 N 1950 W  
 Salt Lake City, UT 84134-0260