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

• Amended Return - enter code: ________ (see instructions)

Full-yr Resident? ________

Your Social Security No. ____________________________
Your first name ____________________________
Your last name ____________________________

Spouse’s Soc. Sec. No. ____________________________
Spouse’s first name ____________________________
Spouse’s last name ____________________________

Address ____________________________
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)

If using code 2 or 3, enter spouse’s name and SSN above

2 Qualifying Dependents

a ______ Dependents age 16 and under
b ______ Other dependents
c ______ Total (add lines a and b)

Dependents must be claimed for the child tax credit on your federal return. See instructions.

3 Election Campaign Fund

Does not increase your tax or reduce your refund.
Enter the code for the party of your choice. • ______ • ______
See instructions for code letters or go to incometax.utah.gov/elect
If no contribution, enter N.

4 Federal adjusted gross income from federal return

5 Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)

6 Total income - add line 4 and line 5

7 State tax refund included on federal form 1040, Schedule 1, line 10 (if any)

8 Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)

9 Utah taxable income (loss) - subtract the sum of lines 7 and 8 from line 6

10 Utah tax - multiply line 9 by 4.95% (.0495) (not less than zero)

11 Utah personal exemption (multiply line 2c by $565)

12 Federal standard or itemized deductions

13 Add line 11 and line 12

14 State income tax deducted on federal Schedule A, line 5a (if any)

15 Subtract line 14 from line 13

16 Initial credit before phase-out - multiply line 15 by 6% (.06)

17 Enter: $14,256 (if single or married filing separately); $21,384 (if head of household); or $28,512 (if married filing jointly or qualifying widower)

18 Income subject to phase-out - subtract line 17 from line 9 (not less than zero)

19 Phase-out amount - multiply line 18 by 1.3% (.013)

20 Taxpayer tax credit - subtract line 19 from line 18 (not less than zero)

21 If you are a qualified exempt taxpayer, enter “X” (complete worksheet in instr.)

22 Utah income tax - subtract line 20 from line 18 (not less than zero)
23 Enter tax from TC-40, page 1, line 22

24 Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)

25 Full-year resident, subtract line 24 from line 23 (not less than zero)
   Non or Part-year resident, complete and enter the UTAH TAX from TC-40B, line 37

26 Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)

27 Subtract line 26 from line 25 (not less than zero)

28 Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)

29 AMENDED RETURN ONLY - previous refund

30 Recapture of low-income housing credit

31 Utah use tax

32 Total tax, use tax and additions to tax (add lines 27 through 31)

33 Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1)

34 Credit for Utah income taxes prepaid from TC-546 and 2017 refund applied to 2018

35 Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2)

36 Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2)

37 AMENDED RETURN ONLY - previous payments

38 Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)

39 Total withholding and refundable credits - add lines 33 through 38

40 TAX DUE - subtract line 39 from line 32 (not less than zero)

41 Penalty and interest (see instructions)

42 TOTAL DUE - PAY THIS AMOUNT - add line 40 and line 41

43 REFUND - subtract line 32 from line 39 (not less than zero)

44 Voluntary subtractions from refund (not greater than line 43)

45 DIRECT DEPOSIT YOUR REMAINING REFUND - provide account information (see instructions for foreign accounts)

   • Routing number
   • Account number
   • Account type: • checking • savings

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

THIRD PARTY NAME OF DESIGNEE (IF ANY) YOU AUTHORIZE TO DISCUSS THIS RETURN

Designee’s telephone number

Designee PIN

•

PAID PREPARER’S SIGNATURE DATE

Preparer’s telephone number

Preparer’s PTIN

•

PREPARER’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 my529 account, want to apply all/part of your refund to next year’s taxes, want to 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) • mm/yy
See incometax.utah.gov/filing/fiscal-year-filing.

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.

Part 4 - Voluntary Contributions (write the code and amount of each voluntary contribution)
See explanation of each contribution at incometax.utah.gov/contributions and/or the TC-40 instructions

<table>
<thead>
<tr>
<th>Code</th>
<th>Amount</th>
<th>Sch Dist Code</th>
</tr>
</thead>
<tbody>
<tr>
<td>02</td>
<td>Pamela Atkinson Homeless Account</td>
<td></td>
</tr>
<tr>
<td>03</td>
<td>Kurt Oscarson Children's Organ Transplant Account</td>
<td></td>
</tr>
<tr>
<td>05</td>
<td>School District and Nonprofit School District Foundation - enter school district code</td>
<td>• ________</td>
</tr>
<tr>
<td></td>
<td>See instructions for school district codes, or get codes at incometax.utah.gov/contributions/school-districts</td>
<td>• ________</td>
</tr>
<tr>
<td>15</td>
<td>Clean Air Fund</td>
<td></td>
</tr>
<tr>
<td>16</td>
<td>Governor’s Suicide Prevention Fund</td>
<td></td>
</tr>
</tbody>
</table>

Total voluntary contributions (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 my529 (formerly UESP) account(s): • 1 ________ .00
   See instructions. Also see my529.org, or call 1-800-418-2551.
2. Enter the amount of your refund you want applied to your 2019 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

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