



FORM 40A FULL YEAR RESIDENTS ONLY Alabama Individual Income Tax Return 1997

For individual taxpayers whose income does not exceed \$20,000 (single) or \$40,000 (married filing joint)

Form section for name and address. Includes fields for 'Your first name and initial', 'Last name', 'Present home address', and 'City, town or post office, state, and ZIP code'. A large watermark 'PLACE LABEL HERE' is overlaid on the address field.

Form section for social security numbers. Includes fields for 'Your social security number' and 'Spouse's soc. sec. no. if joint return'.

FN (For official use only)

Filing Status and Exemptions

Form section for filing status and exemptions. Lines 1-4 with descriptions: 1 \$1,500 Single; 2 \$3,000 Married filing joint return; 3 \$1,500 Married filing separate return; 4 \$3,000 Head of family.

Form section for name and relationship. Line 5 Name, Soc. Sec. No., and Relationship.

Income and Adjustments

Form section for income and adjustments. Lines 6-9. Includes columns for 'A - Alabama tax withheld' and 'B - Income'. Line 6: Wages, salaries, tips, etc. Line 7: Other income. Line 8: Federal income tax refunds received in 1997. Line 9: Total income.

Deductions

Form section for deductions. Lines 10-14. Line 10: Standard Deduction. Line 11: Federal income tax withheld and paid during 1997. Line 12: Personal exemption. Line 13: Dependent exemptions. Line 14: Total deductions.

Tax and Payments

Form section for tax and payments. Lines 15-19. Line 15: Taxable income. Line 16: Find the tax on the amount on line 15. Line 17: Voluntary contributions to Alabama Democratic Party, Alabama Republican Party, or Neighbors Helping Neighbors Fund. Line 18: Total tax liability and political contribution. Line 19: Alabama income tax withheld.

AMOUNT YOU OWE

Form section for amount you owe. Line 20: If line 18 is larger than line 19, subtract line 19 from line 18, and enter AMOUNT YOU OWE. Attach check or money order for the full amount payable to "Alabama Department of Revenue".

OVERPAID

Form section for overpaid. Line 21: If line 19 is larger than line 18, subtract line 18 from line 19 and enter amount OVERPAID.

Donation Check-offs

Form section for donation check-offs. Line 22: You may donate all or part of your overpayment. Lines 22a-j list various funds: AL Aging Fund, AL Arts Development Fund, AL Nongame Wildlife Fund, Child Abuse Trust Fund, AL Veterans Program, AL Indian Children's Scholarship Fund, Penny Trust Fund, Foster Care Trust Fund, Alliance for the Mentally Ill of AL, Mental Health Consumers of AL. Line 23: Total.

PLEASE: Verify your social security number, Recheck your math, Sign return below, Attach W-2 form(s)

REFUND

Form section for refund. Line 24: REFUNDED TO YOU. Subtract line 23 from line 21. (CAUTION: You must sign this return before it can be processed.)

Please Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements and to the best of my knowledge and belief they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Form section for signatures. Includes fields for 'Your signature', 'Date', 'Daytime Tel. No.', 'Spouse's signature (if filing jointly, BOTH must sign)', 'Preparer's signature', 'Date', 'Check if self-employed', 'Preparer's social security no.', 'Firm's name (or yours, if self-employed) and address', 'E.I. No.', and 'ZIP Code'.

Paid Preparer's Use Only

If you do not need state income tax forms and instructions mailed to you next year, check here. (A mailing label only will be sent to you.)

**PART I**

**General Information**

All Taxpayers Must Complete This Section

1 Were you (and your spouse, if married filing jointly) a resident of Alabama for the entire year 1997? .....  Yes  No  
 If you checked no, **DO NOT COMPLETE THIS FORM.** See "Which Form To File" on page 5 of instructions.

2 Did you file an Alabama income tax return for the year 1996? .....  Yes  No  
 If you checked no, state the reason for not filing. \_\_\_\_\_

3 Give name and address of your present employer:  
 Yourself \_\_\_\_\_  
 Your Spouse \_\_\_\_\_

4 Your occupation \_\_\_\_\_ Spouse's occupation \_\_\_\_\_

5 Enter your Adjusted Gross Income reported on your **1997 Federal** Individual Income Tax Return: \$ \_\_\_\_\_

6 Do you have income which is reported on your Federal return, but not reported on your Alabama return?.....  Yes  No  
 If yes, enter source(s) and amount(s) below (*other than state income tax refund*):  
 Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  
 Source \_\_\_\_\_ Amount \$ \_\_\_\_\_  
 Source \_\_\_\_\_ Amount \$ \_\_\_\_\_

**PART II**

**Dependents**

Do not include yourself or your spouse

(See page 10)

1a Dependents:	(1) First name	Last name	(2) Dependent's social security number.	(3) Dependent's relationship to you.	(4) Did you provide more than one-half dependent's support?

b Total number of dependents claimed above .....

2 **Amount allowed.** (Multiply \$300 by the total number of dependents claimed on line 1b.)  
 Enter amount here and on page 1, line 13 .....  **2**

**PART III**

**Standard Deduction Computation**

All Taxpayers Must Complete This Section

Indicate the filing status you checked on page 1, Form 40A:

**Filing Status**

1  Single  
 2  Married filing joint  
 3  Married filing separate  
 4  Head of family

1a Enter total income as shown on line 9, page 1, Form 40A .....  **1**

b Multiply this amount by 20% .....  x 20%

2 Enter the result on this line .....  **2**

3a If you checked filing status 1, 3, or 4, enter \$2,000, or  
 b If you checked filing status 2, enter \$4,000 .....  **3**

**Standard deduction allowable.** Compare the amounts on lines 2 and 3 above.  
 Enter **ONLY THE SMALLER AMOUNT** on line 10, page 1, Form 40A.

**Final Checklist**

Before Mailing Your Return Have You –

- Checked your name and address to see if it is correct? Your refund will be mailed to the address shown on your return. (Use your peel off label if you have one.)
- Entered your social security number(s) in the space(s) provided?
- Attached all of your withholding statements?
- Signed your return? If filing a joint return, your spouse must also sign.
- Attached check or money order for Amount You Owe?
- Made a copy of this return for your records? You will need a copy in case you have questions about your return after you have mailed it to us.
- Used the mailing envelope provided in the booklet mailed to you?

**Each year thousands of refunds are delayed because of incorrect addresses or other errors. Please take a few minutes to check your return before you mail it. Filing a complete and accurate return will help us process your refund faster.**

**Where To File Form 40A**

If an addressed envelope came with your return, please use it. If you do not have one, mail your return to one of the addresses below.

If you are due a refund, mail your return to:

Alabama Income Tax Division  
 P. O. Box 327465  
 Montgomery, AL 36132-7465

If you are not due a refund, mail your return to:

Alabama Income Tax Division  
 P. O. Box 327477  
 Montgomery, AL 36132-7477

Mail **ONLY** your 1997 Form 40A to the above address. Amended returns and all other correspondence should be mailed to: Alabama Department of Revenue, Income Tax Division, P.O. Box 327410, Montgomery, AL 36132-7410.