

Utah Individual Income Tax Return

All State Income Tax Dollars Fund Education
incometax.utah.gov

2005

TC-40

If fiscal year, enter
ending date (mm/yy)

• **FOR AMENDED RETURN - ENTER CODE (1 - 5) from page 3**

9998

Your Social Security number

Spouse's Social Security number

IMPORTANT!

Social Security Number(s) Required

Your name D		Last name X box if deceased	
Spouse's name		Last name X box if deceased	
Mailing address		Telephone number	
City	State UT	ZIP code	Foreign country (if not U.S.)

1. Filing status - enter code (page 4)

• D

Enter code here

CODE

- A = Single
 B = Head of household
 C = Married filing jointly
 D = Married filing separately
 E = Qualifying widow(er)

If filing married jointly or
separately, enter spouse's
name and social security
number above.

2. Exemptions - enter number (page 4)

- a 1 Yourself
 b Spouse
 c 4 Dependents
 d Disabled dependents (see instructions)
 e 5 Total exemptions (add a through d)

From federal return

3. Election campaign fund - enter code (page 4)

CODE

- C = Constitution
 D = Democrat
 G = Green
 L = Libertarian
 P = Personal Choice
 R = Republican
 N = No contribution

Youself Spouse

Entering a code does
not increase your tax or
reduce your refund.

INCOME

4. Federal adjusted gross income from federal return (see instructions on page 5) • 4 -27617
5. State income tax deducted as an itemized deduction on federal form 1040, Schedule A, line 5 (page 5) • 5
6. Additions to income from form TC-40S, Part 1 (page 5) 6
7. Total adjusted income (add lines 4 through 6) 7 -27617

DEDUCTIONS

8. Standard or itemized deduction (page 6) • 8 5000
9. Personal exemptions deduction. Multiply \$2,400 by line 2e (if line 4 is greater than \$109,475, see page 6) • 9 12000
10. One-half of the federal tax (page 6) • 10 0
11. State tax refund included on line 10 of federal form 1040 (page 6) • 11 3200
12. Retirement exemption/deduction - use TC-40B (page 6) • 12
- Enter X if age 65 or older • Taxpayer is 65 or older • Spouse is 65 or older
13. Other deductions from form TC-40S, Part 2 (page 7) 13
14. Total deductions (add lines 8 through 13) 14 20200
15. Utah 2005 taxable income (subtract line 14 from line 7). If less than zero, enter zero. • 15 0

TAX

16. CALCULATE INCOME TAX: Read instructions on page 9 for lines 16a and 16b.

• 16a Qualified taxpayers Amount from worksheet Tax • 16b 0

17. FOR NON OR PART-YEAR RESIDENTS ONLY - Attach form TC-40C (page 9)

Nonresident. Home state abbreviation: _____ Part-year resident from ____/____/05 to ____/____/05

Enter information below from Utah form TC-40C (divide Box a by Box b to get a ratio (decimal) for Box c)

• Box a. From Column A, line 32

• Box b. From Column B, line 32

Box c. Utah income tax ratio

Non or part-year residents only
(Multiply line 16b by decimal in Box c)

NONREFUNDABLE CREDITS CONTRIBUTIONS ADDITIONS TO TAX

18. Enter tax (full-year Utah resident, enter tax from line 16b - non or part-year resident, enter tax from line 17) 18 0
19. Nonrefundable credits from form TC-40S, Part 3 (pages 10 through 12) 19
20. Subtract line 19 from line 18 (Note: If line 19 is greater than or equal to line 18, enter zero) 20 0
21. **Contributions** (pages 12 and 13 - add lines 21a through 21f and enter total contributions on line 21)

Enter the codes shown below and the contribution amount.
The "SCH/TECH CODE" is an additional code used only
if contributing to codes 05 and/or 06 shown below (pg 13).

CODE AMOUNT SCH/TECH CODE

Code Description

- 01 Utah Nongame Wildlife Fund
- 02 Pamela Atkinson Homeless Trust Fund
- 03 Kurt Ocarson Children's Organ Transplant Fund
- 05 School District & Nonprofit School Dist. Foundation
- 06 Utah College of Applied Technology
- 07 Uniform School Fund
- 08 Wolf Depredation Fund

• 21a

• 21b

• 21c

• 21d

• 21e

• 21f

21

22. AMENDED RETURNS ONLY - previous refund (page 13) • 22

23. Tax from recapture of credits (page 13) • 23

24. Utah use tax (page 13) • 24 0

25. Total tax, use tax and additions to tax (add lines 20 through 24) 25 0

26. UTAH TAX WITHHELD (must attach Utah W-2 and/or 1099 forms) (page 14) UTAH TAX WITHHELD • 26 2200

27. Credit for Utah income taxes prepaid (page 14) • 27

28. AMENDED RETURNS ONLY - previous payments (page 14) • 28

29. Refundable credits from form TC-40S, Part 4 (pages 14 and 15) 29

30. Total (add lines 26 through 29) 30 2200

WITHHOLDING CREDITS

31. Tax due - If line 25 is greater than line 30, subtract line 30 from line 25. This is the amount you owe. You will be billed for any penalty and interest owed. See page 15 about payment options. Use enclosed envelope or mail to Utah State Tax Commission, 210 N 1950 W, SLC, UT 84134-0266

TAX DUE ☹️ 31

32. Refund - If line 30 is greater than line 25, subtract line 25 from line 30. This is your refund. (page 15) Use enclosed envelope or mail to Utah State Tax Commission, 210 N 1950 W, SLC, UT 84134-0260

REFUND 😊 32

33. Enter the amount of refund you want applied to your 2006 taxes. Your refund will be reduced by this amount. (page 15) • 33 0

34. DIRECT DEPOSIT YOUR REFUND. Complete information below. (page 15)

• Routing number

• Account number

4/25/07 received 1099s for this amt.
2200
yet fed. still under audit

Amount to be applied to 2006

Account type - enter code here
C = Checking
S = Savings

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules reflect my true tax status.

SIGN HERE Your signature

Date signed

Spouse's signature (if filing jointly, both MUST sign even if only one had income)

Date signed

03/10/06

**Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R,
Distributions From Pensions, Annuities, Retirement or
Profit-Sharing Plans, IRAs, Insurance Contracts, Etc.**

OMB No.
1545-0458

Attach to Form 1040, 1040A, 1040-EZ or 1040X

1. Name (First, middle, last)

D

2. Social security number (SSN)

3. Address

4. Please fill in the year at the end of the statement. I have been unable to obtain (or have received an incorrect) Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-sharing Plans IRA's, Insurance Contracts, etc., from my employer or payer named below. I have notified the Internal Revenue Service of this fact. The amounts shown below are my best estimates of all wages or payments paid to me and Federal taxes withheld by this employer or payer during 2005 (year)

5. Employer's or payer's name, address and ZIP code

6. Employer's or payer's identification number (if known)

7(A) Enter wages, compensations and taxes withheld

a. Wages (Note: Include (1) the total wages paid (2) noncash payments, (3) tips /reported and (4) all other compensation before deductions for taxes, insurance, etc.)	-0-
b. Social security wages	-0-
c. Medicare wages	-0-
d. Advance EIC payments	-0-
e. Social security tips	-0-

f. Federal income tax withheld	9,684.12
g. State tax withheld (Name or state) <u>UT</u>	\$2,199.60
h. Local tax withheld (Name of locality)	
i. Social security tax withheld	\$2,083.20
j. Medicare tax withheld	\$487.20

7(B). Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

1. Gross Distribution	
2a. Taxable Amount	
2b. Taxable Amount not determined ☐	
Total Distribution ☐	
3. Capital Gains (included in 2a)	

4. Federal Income Tax Withheld	
5. State Income Tax Withheld	
6. Employee Contribution	
7. Net Unrealized Appreciation	
8. Enter Distribution Code	

8. How did you determine the amounts in item 7 above?

Company provided records and the statutory language behind IRC sections 3401 and others.

9. Explain your efforts to obtain Form W-2, 1099-R, or W-2c, Statement of Corrected Income and Tax Amounts.

Requested, but company refuses to issue forms correctly listing payments of "wages" as defined in 3401(a) and 3121(a) for fear of IRS retaliation. The amounts listed as withheld on the W-2 it submitted are correct, however.