

**2002**  
**FORM**  
**40A**  
FULL YEAR  
RESIDENTS ONLY  
**Alabama**  
**Individual**  
**Income**  
**Tax Return**

Your first name and initial (if joint return, also give spouse's first name and initial) \_\_\_\_\_ Last name \_\_\_\_\_

Present home address (number and street or P. O. Box number) \_\_\_\_\_

City, town or post office, state, and ZIP code \_\_\_\_\_

PLACE LABEL HERE

Your social security number \_\_\_\_\_

Spouse's soc. sec. no. if joint return \_\_\_\_\_

FN (For official use only)

**Filing Status and Exemptions**  
Check only one box

1  \$1,500 Single

2  \$3,000 Married filing joint return (even if only one spouse had income)

3  \$1,500 Married filing separate return. Complete line 5 with spouse's name and soc. sec. no.

4  \$3,000 Head of family (with qualifying person). (See page 7 of instructions.) Complete line 5.

5 Name \_\_\_\_\_

Soc. Sec. No. \_\_\_\_\_

Relationship \_\_\_\_\_

**Income and Adjustments**

6 Wages, salaries, tips, etc. (list each employer and address separately).		A — Alabama tax withheld		B — Income	
a	b	6a	6b	6a	6b
			00		00
			00		00
			00		00
			00		00
7	Interest and dividend income. If over \$1,500.00, use Form 40	7			00
8	<b>Total income.</b> Add lines 6a through 6d and 7 (column B)	8			00

**Deductions**

You Must Attach page 2 of Federal Form 1040, page 2 of Federal Form 1040A or page 1 of Form 1040EZ, or a copy of your Telefile Schedule if claiming a deduction on line 10.

9	Standard Deduction (complete Part III, and enter amount here)	9		00
10	Federal tax liability deduction. See page 8 of instructions	10		00
11	Personal exemption (from line 1, 2, 3, or 4)	11		00
12	Dependent exemptions (from page 2, Part II, line 2)	12		00
13	<b>Total deductions.</b> Add lines 9, 10, 11, and 12	13		00

**Tax and Payments**

Staple Form(s) W-2, W-2G, and/or 1099 here.

14	<b>Taxable income.</b> Subtract line 13 from line 8. Enter the result	14		00
15	Find the tax for the amount on line 14. Use the tax table in the Instruction Booklet.	15		00
16	Consumer Use Tax (use worksheet on page 9)	16		00
17	You may make a voluntary contribution to:	17a		00
	a Alabama Democratic Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17b		00
	b Alabama Republican Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17c		00
	c Alabama Libertarian Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	17d		00
	d Neighbors Helping Neighbors \$ _____	18		00
18	<b>Total tax liability and voluntary contribution.</b> Add lines 15, 16, 17a, 17b, 17c, and 17d	18		00
19	<b>Alabama income tax withheld.</b> Add lines 6a thru 6d, column A	19		00

**AMOUNT YOU OWE**

20 If line 18 is larger than line 19, subtract line 19 from line 18, and enter **AMOUNT YOU OWE.** Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.) If paying by credit card do not include Form 40V and check here

**OVERPAID**

21 If line 19 is larger than line 18, subtract line 18 from line 19 and enter amount **OVERPAID**

**Donation Check-offs**

22	You may donate all or part of your overpayment. (Enter \$1, \$5, \$10, \$25, none, or other amount in the appropriate boxes).			
a	Senior Services Trust Fund	00	f AL Indian Children's Scholarship Fund	00
b	AL Arts Development Fund	00	g Penny Trust Fund	00
c	AL Nongame Wildlife Fund	00	h Foster Care Trust Fund	00
d	Child Abuse Trust Fund	00	i Mental Health	00
e	AL Veterans Program	00	j AL Breast & Cervical Cancer Program	00
23	<b>Total.</b> Add lines 22a, b, c, d, e, f, g, h, i, and j	23		00

**PLEASE**

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

**REFUND**

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.

Your signature \_\_\_\_\_ Date \_\_\_\_\_ Daytime Telephone No. \_\_\_\_\_ Spouse's signature (if filing jointly, BOTH must sign) \_\_\_\_\_

**Paid Preparer's Use Only**

Preparer's signature \_\_\_\_\_ Date \_\_\_\_\_ Check if self-employed  Preparer's SSN or PTIN \_\_\_\_\_

Firm's name (or yours, if self-employed) and address \_\_\_\_\_ E.I. No. \_\_\_\_\_ ZIP Code \_\_\_\_\_

**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 2002?  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 2001?  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 the Federal Adjusted Gross Income \$ \_\_\_\_\_ and Federal Taxable Income \$ \_\_\_\_\_ as reported on your **2002 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 12 ▶ 2      00

**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 8, page 1, Form 40A.....	1	00
b Multiply this amount by 20% .....	x 20%	
2 Enter the result on this line..... ▶	2	00
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	00

▶ **Standard deduction allowable.** Compare the amounts on lines 2 and 3 above.  
Enter **ONLY THE SMALLER AMOUNT** on line 9, 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.
- Placed payment, along with Form 40V, loose in the mailing envelope.
- 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 **not** making a payment, mail your return to:

**Alabama Department of Revenue**  
**P. O. Box 327465**  
**Montgomery, AL 36132-7465**

If you are making a payment, mail your return, Form 40V, and payment to:

**Alabama Department of Revenue**  
**P. O. Box 327477**  
**Montgomery, AL 36132-7477**

Mail **ONLY** your 2002 Form 40A to one of the above addresses. Amended returns and all other correspondence should be mailed to: Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.