# Alabama Individual Income Tax Return

## Residents & Part-Year Residents

For the year Jan. 1 - Dec. 31, 2018, or other tax year:  
Beginning:  
Ending:  

### Your first name  
Initial  
Last name  

### Spouse’s first name  
Initial  
Last name  

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

City, town or post office  
State  
ZIP code  

Check if address  
☐ is outside U.S.  

Foreign Country  

### Filing Status/Exemptions

1. ☐ $1,500 Single  
2. ☐ $3,000 Married filing joint  
3. ☐ $1,500 Married filing separate. Complete Spouse SSN  
4. ☐ $3,000 Head of Family (with qualifying person). Complete Schedule HOF  

### Income and Adjustments

5a. Alabama Income Tax Withheld (from Schedule W-2, line 18, column G)  
5b. Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J)  
6. Interest and dividend income (also attach Schedule B if over $1,500)  
7. Other income (from page 2, Part I, line 9)  
8. **Total income.** Add amounts in the income column for line 5b through line 7  
9. **Total adjustments to income** (from page 2, Part II, line 13)  
10. Adjusted gross income. Subtract line 9 from line 8  

### Deductions

11. **Check box a, if you itemize deductions, and enter amount from Schedule A, line 27.**  
   **Check box b, if you do not itemize deductions, and enter standard deduction** (see instructions)  
   
   - [☐] Itemized Deductions  
   - [☐] Standard Deduction  

12. Federal tax deduction (see instructions)  
13. Personal exemption (from line 1, 2, 3, or 4)  
14. Dependent exemption (from page 2, Part III, line 2)  
15. **Total deductions.** Add lines 11, 12, 13, and 14  

### Tax

16. Taxable income. Subtract line 15 from line 10  
17. **Income Tax due.** Enter amount from tax table or check if from ☐ Form NOL-85A  
18. **Net tax due Alabama.** Check box if computing tax using Schedule NTC ☐ otherwise enter amount from line 17  
19. Consumer Use Tax (see instructions). If you certify that no use tax is due, check box ☐  
20. **Alabama Election Campaign Fund.** You may make a voluntary contribution to the following:  
   a. Alabama Democratic Party ☐ $1 ☐ $2 ☐ none  
   b. Alabama Republican Party ☐ $1 ☐ $2 ☐ none  
21. **Total tax liability and voluntary contribution.** Add lines 18, 19, 20a, and 20b  

### Payments

22. **Alabama income tax withheld** (from column A, line 5a)  
23. **2018 estimated tax payments/Automatic Extension Payment.**  
24. Amended Returns Only — Previous payments (see instructions)  
25. Refundable Credits. Enter the amount from Schedule RC, line 4  
26. **Total payments.** Add lines 22, 23, 24, and 25  
27. Amended Returns Only — Previous refund (see instructions)  
28. Adjusted Total Payments. Subtract line 27 from line 26  

### AMOUNT YOU OWE

29. If line 21 is larger than line 28, subtract line 28 from line 21, and enter AMOUNT YOU OWE. Place payment, along with Form 40V, loose in the mailing envelope. *(FORM 40V MUST ACCOMPANY PAYMENT.)*  
30. Estimated tax penalty. Also include on line 29 (see instructions page 12)  

### OVERPAID

31. If line 28 is larger than line 21, subtract line 21 from line 28, and enter amount OVERPAID  
32. Amount of line 31 to be applied to your **2019 estimated tax**  
33. Total Donation Check-offs from Schedule DC, line 2  

### Donations

34. **REFUNDED TO YOU.** *(CAUTION: You must sign this return on the reverse side.)*  

Subtract lines 32 and 33 from line 31  

<table>
<thead>
<tr>
<th>A – Alabama tax withheld</th>
<th>B – Income</th>
</tr>
</thead>
<tbody>
<tr>
<td>5a</td>
<td>00</td>
</tr>
<tr>
<td>5b</td>
<td>00</td>
</tr>
<tr>
<td>9</td>
<td>00</td>
</tr>
<tr>
<td>10</td>
<td>00</td>
</tr>
</tbody>
</table>

**CHECK BOX IF AMENDED RETURN**  
☐

**Your social security number**  

☐ Check if primary is deceased  
Primary’s deceased date (mm/dd/yy)  

☐ Check if spouse is deceased  
Spouse’s deceased date (mm/dd/yy)  

**ADOR**
**PART I**

1. Alimony received 

2. Business income or (loss) (attach Federal Schedule C or C-EZ) (see instructions) 

3. Gain or (loss) from sale of Real Estate. Stocks, Bonds, etc. (attach Schedule D) 

4a. Total IRA distributions 

4b. Taxable amount (see instructions) 

5a. Total pensions and annuities 

5b. Taxable amount (see instructions) 

6. Rent, royalties, partnerships, estates, trusts, etc. (attach Schedule E) 

7. Farm income or (loss) (attach Federal Schedule F) 

8. Other income (state nature and source — see instructions) 

9. Total other income. Add lines 1 through 6. Enter here and also on page 1, line 7. 

**PART II**

1a. Your IRA deduction 

1b. Spouse’s IRA deduction 

2. Payments to a Keogh retirement plan and self-employment SEP deduction 

3. Penalty on early withdrawal of savings 

4. Alimony paid. Recipient’s last name (see instructions) 

4. Social security no. 

5. Adoption expenses 

6. Moving Expenses (Attach Federal Form 3903) to City State ZIP 

7. Self-employed health insurance deduction 

8. Payments to Alabama College Counts 529 Fund or Alabama PACT Program 

9. Health insurance deduction for small employer employee (see instructions) 

10. Costs to retrofit or upgrade home to resist wind or flood damage 

11. Deposits to a catastrophe savings account 

12. Contributions to a health savings account 

13. Total adjustments. Add lines 1 through 12. Enter here and also on page 1, line 9. 

**PART III**

1. Total number of dependents from Schedule DS, line 1b. 

2. Amount allowed. Multiply total number of dependents claimed on line 1 by the amount on the dependents chart on page 10 of Instructions. Enter amount here and on page 1, line 7. 

**PART IV**

1. Residency Check only one box: 

   - Full Year 

   - Part Year 

   From 2018 through 2018. 

2. Did you file an Alabama income tax return for the year 2017? 

   - Yes 

   - No 

   If no, state reason 

3. Give name and address of present employer(s). Yours 


5. Do you have income which is reported on your Federal return, but not reported on your Alabama return (other than your state tax refund)? 

   - Yes 

   - No 

   If yes, enter source(s) and amount(s) below: (other than state income tax refund) 

   Source 

   Amount 

   Source 

   Amount 

**Drivers License Info** 

- DOB (mm/dd/yyyy) 

- DL# 

- Exp date (mm/dd/yyyy) 

- Issue date (mm/dd/yyyy) 

- Spouse DOB (mm/dd/yyyy) 

- Spouse DL# 

- Spouse Exp date (mm/dd/yyyy) 

- Spouse Issue date (mm/dd/yyyy) 

**Sign Here In Black Ink** 

- I authorize a representative of the Department of Revenue to discuss my return and attachments with my preparer. 

**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.**

**Preparer’s Use Only** 

- Preparer’s signature 

- Date 

- Daytime telephone no. 

- E.I. No. 

- Preparer’s SSN or PTIN 

**WHERE TO FILE FORM 40** 

- Alabama Department of Revenue, P.O. Box 154, Montgomery, AL 36135-0001 

- Alabama Department of Revenue, P.O. Box 2401, Montgomery, AL 36140-0001 

- Alabama Department of Revenue, P.O. Box 327469, Montgomery, AL 36132-7469 

Mail only your 2018 Form 40 to one of the above addresses. Prior year returns, amended returns, and all other correspondence should be mailed to Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.