

FORM
40A Alabama 2021
 Individual Income Tax Return
 FULL YEAR RESIDENTS ONLY



For the year Jan. 1 - Dec. 31, 2021, or other tax year:

Beginning: Ending: ●

Your social security number ● Spouse's SSN if joint return ●

Check if primary is deceased Primary's deceased date (mm/dd/yy) ● Check if spouse is deceased Spouse's deceased date (mm/dd/yy) ●

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

▶ CHECK BOX IF AMENDED RETURN ●

Filing Status/ 1 ● \$1,500 Single 3 ● \$1,500 Married filing separate. Complete Spouse SSN ● _____

Exemptions 2 ● \$3,000 Married filing joint 4 ● \$3,000 Head of Family (with qualifying person).

Income and Adjustments	A — Alabama tax withheld		B — Income	
	5a	●	5b	●
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. If over \$1,500.00, use Form 40.			6	●
7 Total income. Add lines 5b and 6 (column B)			7	●
Deductions	8	●		
8 Standard Deduction (enter amount from table on page 9 of instructions)				
9 Federal tax deduction (see instructions)	9	●		
DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S)				
10 Personal exemption (from line 1, 2, 3, or 4)	10	●		
11 Dependent exemptions (from page 2, Part II, line 2)	11	●		
12 Total deductions. Add lines 8, 9, 10, and 11			12	●
13 Taxable income. Subtract line 12 from line 7. Enter the result			13	●
14 Find the tax for the amount on line 13. Use the tax table in the Instruction Booklet			14	●
15 Consumer Use Tax (see instructions). If you certify that no use tax is due, check box ● <input type="checkbox"/>			15	●
16 You may make a voluntary contribution to: a Alabama Democratic Party		<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	16a	●
b Alabama Republican Party		<input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	16b	●
17 Total tax liability and voluntary contribution. Add lines 14, 15, 16a, and 16b			17	●
18 Alabama income tax withheld (from column A, line 5a)			18	●
19 Automatic Extension Payment			19	●
20 Amended Returns Only — Previous payments (see instructions)			20	●
21 Total payments. Add lines 18, 19 and 20			21	●
22 Amended Returns Only — Previous refund (see instructions)			22	●
23 Adjusted Total Payments. Subtract line 22 from line 21			23	●
AMOUNT YOU OWE				
24 If line 17 is larger than line 23, subtract line 23 from line 17, and enter AMOUNT YOU OWE. Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.)			24	●
OVERPAID				
25 If line 23 is larger than line 17, subtract line 17 from line 23 and enter amount OVERPAID.			25	●
Donations				
26 Total Donation Check-offs from page 2, Part IV, line 2.			26	●
REFUND				
27 REFUNDED TO YOU. Subtract line 26 from line 25. (You MUST SIGN this return before your refund can be processed.)			27	●

● 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.

Sign Here In Black Ink
 Keep a copy of this return for your records.

Your Signature _____ Date _____ Daytime Telephone Number _____ Your Occupation _____

Spouse's Signature (if joint return, BOTH must sign) _____ Date _____ Daytime Telephone Number _____ Spouse's Occupation _____

Preparer's Signature _____ Date _____ Check if Self-employed Preparer's SSN or PTIN _____ E.I. Number _____

Paid Preparer's Use Only
 Firms's Name (or yours if self employed) _____ Daytime Telephone No. _____ ZIP Code _____
 Address _____



PART I 1 Were you (and your spouse, if married filing jointly) a resident of Alabama for the entire year 2021? 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 2020? Yes No

If you checked no, state the reason for not filing.

3 Give name and address of your present employer:

Yourself

General Information

Your Spouse

All Taxpayers Must Complete This Section.

4 Your occupation

Spouse's occupation

5 Enter the Federal Adjusted Gross Income and Federal Taxable Income as reported on your 2021 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

Table with 4 columns: (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?

Dependents

Do not include yourself or your spouse

b Total number of dependents claimed above 1b

2 Amount allowed. (Multiply the total number of dependents claimed on line 1b by the amount from the dependent chart below.)

Use the following chart to determine the per-dependent exemption amount:

Chart with 2 columns: Amount on Line 7, Page 1, Dependent Exemption

Enter amount here and on page 1, line 11 2

PART III

Federal Tax

Liability Ded.

1 Enter the Federal Income Tax Liability from worksheet (see instructions) here and on line 9, page 1. 1

PART IV

1 You may donate all or part of your overpayment. (Enter the amount in the appropriate boxes.)

Donation Check-offs

Table with 2 columns: Donor/Check-off name, Amount

2 Total Donations. Add lines 1a, b, c, d, e, f, g, h, i, j, k, l, m, n, o, p, q, and r. Enter here and on page 1, line 26 2

Drivers License Info

DOB (mm/dd/yyyy) Your state DL# Iss date (mm/dd/yyyy) Exp date (mm/dd/yyyy)

WHERE TO FILE FORM 40A

If you are receiving a refund, Form 40A, line 27, mail your return to: Alabama Department of Revenue, P.O. Box 154, Montgomery, AL 36135-0001

Mail only your 2021 Form 40A 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.



Alabama Department of Revenue
Wages, Salaries, Tips, etc.

Schedule W-2 must be completed fully and included with your return in order to receive proper credit for your Alabama income tax withheld. Attach a copy of all withholding statements to your return.

NAME(S) AS SHOWN ON TAX RETURN

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.

	A Employee's Social Security Number	B Employer's Identification Number (EIN)	C Statutory Employee	D Schedule C/C-EZ Filed?	E State Code	F Alabama Employer's State ID Number	G Alabama State Income Tax Withheld	H Federal Wages (Box 1 of Form W-2)	I Alabama State Wages (Box 16 of Form W-2)	J Additional Taxable Wages - Other States	
1	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
2	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
3	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
4	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
5	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
6	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
7	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
8	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
9	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
10	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
11	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
12	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
13	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
14	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
15	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
16	TOTAL ALABAMA TAX WITHHELD FROM W-2s. Total lines 1-15, Column G and enter the amount here . . .						•				
17	ALABAMA TAX WITHHELD FROM 1099s AND W-2Gs. Enter the total Alabama Income Tax Withheld from all Form 1099s and Form W-2Gs received. See instructions on where to report the income from these statements						•				
18	TOTAL WAGES AND TOTAL ALABAMA TAX WITHHELD FROM W-2s, 1099s, AND W-2Gs. See instructions						•	•	•	•	

THIS SCHEDULE CAN ONLY BE SUBMITTED AND/OR PRINTED VIA LANDSCAPE

Federal Income Tax Deduction Worksheet

Part I

1 Enter the tax as shown on line 22 on 2021 Form 1040/Form 1040-SR/Form 1040NR.	1		00
2 Net Investment Income Tax. Enter amount from line 17, 2021 Form 8960.	2		00
3 Federal Tax. Add Lines 1 and 2.	3		00
4a Earned Income Credit (EIC) . Enter the amount from line 27a of 2021 Form 1040/Form 1040-SR.	4a	00	
4b Refundable Child Tax Credit or Additional Tax Credit . Enter the amount from Line 28 of 2021 Form 1040/Form 1040-SR.	4b	00	
4c American Opportunity Credit . Enter the amount from line 29 of 2021 Form 1040/Form 1040-SR.	4c	00	
4d Credits from Forms 2439 . Enter the amount from Schedule 3, Part II, line 13a of 2021 Form 1040/Form 1040-SR/Form 1040NR.	4d	00	
5 Add lines 4a,b, c and d.	5		00
6 Subtract line 5 from line 3. If amount is negative enter zero.	6		00

Part II - Pursuant to Act 2022-37 (HB 231) which provides that any federal income tax reductions attributable to the federal child tax credit, the earned income tax credit, and the federal child and dependent care tax credits, the federal income tax deduction shall be calculated as if the individual paid the federal income tax that would otherwise have been paid under the provisions of the Internal Revenue Code in effect on December 31, 2020.

If the amount on your 2021 Federal Form 1040/1040-SR/1040NR line 18 is zero and the Net Investment Income Tax from line 17, 2021 Form 8960 is also zero, STOP, enter zero on Line 15 below.

1 Calculate the basis for the Federal Income Tax Deduction

1a Enter the tax as shown on line 18 on 2021 Form 1040/Form 1040-SR/Form 1040NR.	1a		00
1b Enter the amount as shown on line 19 of 2021 Form 1040/Form 1040-SR/1040NR (non-refundable child tax credit or credit for other dependents from Schedule 8812).	1b		00
1c Enter the 2021 Schedule 3, Part 1, Line 2 (Credit for Child and dependent care expenses (Form 2441, Line 11)).	1c		00
1d Enter the total of nonrefundable credits from Line 21 on 2021 Form 1040/Form 1040-SR/Form 1040NR.	1d		00
1e Add lines 1a, 1b, 1c and then subtract line 1d, if the amount is negative, enter zero.	1e		00
2 Net Investment Income Tax. Enter amount from line 17, 2021 Form 8960.	2		00

Lines 3, 4, 8b & 9e should be recomputed based on 2020 calculations using 2021 information.

	From 2021 1040 / 1040-SR / 1040NR	Recomputed based on 2020 Rules		
3 Child Tax Credit . Enter the recomputed credit based on 2020 1040 Instructions - Child Tax Credit and Credit for Other Dependents Worksheet Line 12.		3	00	
4 Credit for Child and Dependent Care Expenses . Enter the recomputed credit based on 2020 Form 2441 Line 11.		4	00	
5 Total recomputed non-refundable credits - add line 3 and Line 4.		5	00	
6 Subtract Line 5 from Line 1e. If the amount is negative enter zero.		6	00	
7 Add Line 2 and Line 6.		7	00	
8 Earned Income Credit (EIC) . 8a Enter the amount from line 27a of Form 1040/Form 1040-SR; 8b Enter the recomputed credit based on 2020 EIC worksheets and tables.	8a	00	8b	00

9 Additional Child Tax Credit

9a Advanced Child Tax Credit Payments (Schedule 8812 line 14f or 15e).	9a	00		
9b Refundable Child Tax Credit or Additional Tax Credit. Enter the amount from Line 28 of 2021 Form 1040/Form 1040-SR. (Schedule 8812 Line 14i or 15h).	9b	00		
9c Additional Tax (repayment of overpaid tax credit) 2021 1040 Schedule 2 line 19 (Sch 8812 Line 40).	9c	00		
9d Add lines (9a) & (9b) then subtract line (9c); 9e Enter the recomputed credit based on 2020 Form 8812 Line 15.	9d	00	9e	00
10 Refundable Credit for Child and Dependent Care Expenses . 10a Enter the amount from Schedule 3, Part II, line 13g of 2021 Form 1040/Form 1040-SR/Form 1040NR. 10b is zero, this credit was non-refundable in 2020.	10a	00	10b	0 00
11 American Opportunity Credit . Enter the amount from line 29 of 2021 Form 1040/Form 1040-SR.	11	00		
12 Credits from Forms 2439 . Enter the amount from Schedule 3, Part II, line 13a of 2021 Form 1040/Form 1040-SR/Form 1040NR.	12	00		
13 Add lines 8b, 9e, 10b, 11 and 12.	13			00
14 Subtract line 13 from line 7. If amount is negative enter zero.	14			00
15 Federal Income Tax Deduction . Enter the greater of Part I Line 6 or Part II Line 14; also enter on line 12 of Form 40, line 9 of Form 40A or page 2, Part IV, line 4 of Form 40NR.	15			00