

Iowa Individual Income Tax Long Form

IA 1040 1999

FOR OFFICE USE ONLY

or fiscal year beginning ___/___/1999 and ending ___/___/___

Check if first-time Iowa filer.

STEP 1: Place your label or fill in below. You MUST fill in your Social Security Number.

Form section for personal information including last name, first name, and Social Security Number for both the filer and spouse.

Form section for current mailing address including number and street, apartment, lot or suite number, or PO Box, and City, State, ZIP.

Form section for occupation and residence information, including filer's and spouse's occupations, residence on 12/31/99, county and school district numbers, and school district name.

STEP 2 Filing Status: Mark one box only.

Form section for filing status with six numbered options: Single, Married filing joint, Married filing separately, Married filing separate returns, Head of household, and Qualifying widow(er).

STEP 3 Exemptions

YOU (and spouse IF filing jointly)

Form section for filer's exemptions including Personal Credit, blind filer, and dependents.

SPOUSE (IF filing status 3)

Form section for spouse's exemptions including Personal Credit, blind filer, and dependents.

STEP 4

Figure your gross income

Staple W-2s, payment, and voucher here.

Table for Step 4 listing various income sources (Wages, interest, dividends, etc.) and their amounts for Spouse/Status 3, A. You or Joint, and B. Spouse/Status 3.

STEP 5

Figure your adjustments to income

Table for Step 5 listing adjustments to income (IRA payments, health insurance, etc.) and their amounts for B. Spouse/Status 3, A. You or Joint, and B. Spouse/Status 3.

STEP 6

Figure your Federal tax addition and deduction

Table for Step 6 listing Federal taxes (refund, self-employment, etc.) and their amounts for B. Spouse/Status 3, A. You or Joint, and B. Spouse/Status 3.

| | | B. Spouse/Status 3 | A. You or Joint | B. Spouse/Status 3 | A. You or Joint |
|----------------|---|--------------------|-----------------|--------------------|-----------------|
| STEP 7 | 36. BALANCE. From side 1, line 35. | 36. | .00 | .00 | .00 |
| | 37. Total itemized deductions from Federal Schedule A .. | 37. | .00 | .00 | .00 |
| | 38. Iowa income tax if included in line 37 | 38. | .00 | .00 | .00 |
| | 39. BALANCE. SUBTRACT line 38 from line 37. | 39. | .00 | .00 | .00 |
| | 40. Other deductions. See page 13. | 40. | .00 | .00 | .00 |
| | 41. Deduction. Check one box. <input type="checkbox"/> Itemized. Add lines 39 and 40. <input type="checkbox"/> Standard. See page 14. | 41. | .00 ▲ | .00 | .00 |
| | 42. TAXABLE INCOME. SUBTRACT line 41 from line 36. | 42. | .00 | .00 | .00 |
| STEP 8 | 43. Tax (tables begin on page 22) or alternate tax (see page 14) | 43. | .00 ▲ | .00 | .00 |
| | 44. Iowa lump-sum tax. 25% of Federal tax from form 4972. | 44. | .00 ▲ | .00 | .00 |
| | 45. Iowa minimum tax. Attach IA 6251. See page 14. | 45. | .00 ▲ | .00 | .00 |
| | 46. Total tax. ADD lines 43, 44 and 45. | 46. | .00 | .00 | .00 |
| | 47. Total exemption credit amount(s) from Step 3, side 1 | 47. | .00 | .00 | .00 |
| | 48. Iowa earned income credit: 6.5% of Federal credit | 48. | .00 ▲ | .00 | .00 |
| | 49. Tuition and textbook credit. See page 15. | 49. | .00 ▲ | .00 | .00 |
| | 50. Total credits. ADD lines 47, 48 and 49. | 50. | .00 | .00 | .00 |
| | 51. BALANCE. SUBTRACT line 50 from line 46. If less than zero, enter zero. | 51. | .00 ▲ | .00 | .00 |
| | 52. Credit for nonresidents or part-year resident. See page 15. Attach IA 126 and Federal return. | 52. | .00 ▲ | .00 | .00 |
| | 53. BALANCE. SUBTRACT line 52 from line 51. | 53. | .00 | .00 | .00 |
| | 54. Other Iowa credits. See page 16. | 54. | .00 ▲ | .00 | .00 |
| | 55. BALANCE. SUBTRACT line 54 from line 53. | 55. | .00 | .00 | .00 |
| | 56. School district surtax/EMS surtax. See page 16. Tables begin on page 26. | 56. | .00 ▲ | .00 | .00 |
| | 57. Total Tax. ADD lines 55 and 56. | 57. | .00 ▲ | .00 | .00 |
| | 58. Total tax before contributions. ADD Columns A & B on line 57 and enter here. | 58. | .00 | .00 | .00 |
| | 59. Contributions. See page 16. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars. Fish/Wildlife 59a: ▲ _____ State Fair 59b: ▲ _____ Domestic Abuse 59c: ▲ _____ ADD Enter total. | 59. | .00 | .00 | .00 |
| | 60. TOTAL TAX AND CONTRIBUTIONS. ADD lines 58 and 59. | 60. | .00 | .00 | .00 |
| STEP 9 | 61. Iowa income tax withheld from Box 18 of your W-2(s). | 61. | .00 ▲ | .00 | .00 |
| | 62. Estimate and voucher payments made for tax year 1999 | 62. | .00 ▲ | .00 | .00 |
| | 63. Out-of-state tax credit. Attach IA 130. | 63. | .00 ▲ | .00 | .00 |
| | 64. Motor vehicle fuel tax credit. Attach IA 4136. | 64. | .00 ▲ | .00 | .00 |
| | 65. Child and dependent care credit. See page 17. | 65. | .00 ▲ | .00 | .00 |
| | 66. Other refundable credits. See page 17. | 66. | .00 ▲ | .00 | .00 |
| | 67. TOTAL. ADD lines 61-66. | 67. | .00 | .00 | .00 |
| | 68. TOTAL CREDITS. ADD columns A and B on line 67 and enter here. | 68. | .00 | .00 | .00 |
| STEP 10 | 69. If line 68 is more than line 60, SUBTRACT line 60 from line 68. This is the amount you overpaid. | 69. | ▲ | .00 | .00 |
| | 70. Amount of line 69 to be REFUNDED to you. REFUND | 70. | ▲ | .00 | .00 |
| | 71. Amount of line 69 to be applied to your 2000 estimated tax | 71. | .00 ▲ | .00 | .00 |
| | 72. If line 68 is less than line 60, SUBTRACT line 68 from line 60. This is the AMOUNT OF TAX YOU OWE. | 72. | ▲ | .00 | .00 |
| | 73. Penalty for underpayment of estimated tax. From IA 2210 or IA 2210F. | 73. | ▲ | .00 | .00 |
| | 74. Penalty and interest. See page 18. 74a. Penalty. _____ .00 ▲ 74b. Interest _____ 00 ▲ ADD Enter total. | 74. | .00 | .00 | .00 |
| | 75. TOTAL AMOUNT DUE. ADD lines 72, 73 and 74, and enter here. PAY THIS AMOUNT | 75. | ▲ | .00 | .00 |

Complete lines 37-40 ONLY if you itemize.

| | | |
|---|--|--|
| <p>STEP 11</p> <p>POLITICAL CHECKOFF. See page 18. This checkoff does not increase the amount of tax you owe or decrease your refund.</p> <p style="text-align: center;">SPOUSE ▲ YOURSELF</p> <p>\$1.50 to Democratic Party <input type="checkbox"/> <input type="checkbox"/> \$1.50 to Democratic Party</p> <p>\$1.50 to Republican Party <input type="checkbox"/> <input type="checkbox"/> \$1.50 to Republican Party</p> <p>\$1.50 to Campaign Fund <input type="checkbox"/> <input type="checkbox"/> \$1.50 to Campaign Fund</p> | <p>STEP 12</p> <p>NEXT YEAR, I would like to receive:</p> <p>(check one) ▲</p> <p><input type="checkbox"/> 0. a booklet with preprinted label</p> <p><input type="checkbox"/> 2. a postcard with a preprinted label only (not available to electronic filers)</p> <p><input type="checkbox"/> 1. neither a booklet nor a label</p> | <p>STEP 13</p> <p>COW-CALF REFUND Attach IA 132.</p> <p>Do NOT use these amounts to increase your refund (line 69) or reduce the amount you owe (line 72). See page 18.</p> <p>Spouse: \$ _____ .00</p> <p>You: \$ _____ .00 ▲</p> |
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STEP 14

I (We), the undersigned, declare under penalty of perjury that I (we) have examined this return, including all accompanying schedules and statements, and, to the best of my (our) knowledge and belief, it is a true, correct, and complete return. Declaration of preparer (other than taxpayer) is based on all information of which the preparer has any knowledge.

| | | | | |
|------------------|--------------------------|---|--------------------------|-----------------------|
| PLEASE | Your Signature | Date | Preparer's Signature | Date |
| SIGN HERE | Spouse's Signature | Date | Address | |
| SIGN HERE | Daytime Telephone Number | MAIL TO IOWA INCOME TAX PROCESSING DEPARTMENT OF REVENUE AND FINANCE HOOVER STATE OFFICE BUILDING DES MOINES IA 50319-0120 | Daytime Telephone Number | Identification Number |

This return is due May 1, 2000.