

2019 IA 1040 Iowa Individual Income Tax Return

For fiscal year beginning _____/_____/_____ and ending _____/_____/_____

Step 1: Fill in all spaces. You must fill in your Social Security Number (SSN).

Your last name: _____ Your first name/middle initial: _____

Spouse's last name: _____ Spouse's first name/middle initial: _____

Current mailing address (number and street, apartment, lot, or suite number) or PO Box: _____

City, State, ZIP: _____

Spouse SSN: _____ Your SSN: _____

Step 2 Filing Status: Mark one box only

1	Single: Were you claimed as a dependent on another person's Iowa return? Yes <input type="checkbox"/> No <input type="checkbox"/>	Email Address: _____
2	Married filing a joint return. (Two-income families may benefit by using status 3 or 4.)	Check this box if you or your spouse was 65 or older as of 12/31/19. <input type="checkbox"/>
3	Married filing separately on this combined return. Spouse use column B.	Residence on 12/31/19: County No. _____ School District No. _____
4	Married filing separate returns. Spouse's name: _____ ▲ SSN: _____ Net Income: \$ _____	
5	Head of household with qualifying person. If qualifying person is not claimed as a dependent on this return, enter the person's name and SSN below.	
6	Qualifying widow(er) with dependent child. Name: _____ SSN: _____	

Step 3 Exemptions

	B. Spouse (Filing Status 3 ONLY)	A. You or Joint
a. Personal Credit: Col. A: Enter 1 (enter 2 if filing status 2 or 5); Col. B: Enter 1 if filing status 3..... ▲	_____ X \$ 40 = \$ _____	_____ X \$ 40 = \$ _____
b. Enter 1 for each taxpayer who is 65 or older and/or 1 for each taxpayer who is blind..... ▲	_____ X \$ 20 = \$ _____	_____ X \$ 20 = \$ _____
c. Dependents: Enter 1 for each dependent..... ▲	_____ X \$ 40 = \$ _____	_____ X \$ 40 = \$ _____
d. Enter first names of dependents here _____	e. Total \$ _____	e. Total \$ _____

Step 4 Reportable Social Security Benefits as calculated on line 11 of Iowa social security worksheet

	B. Spouse/Status 3 ▲	A. You or Joint ▲
	_____	_____

	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
Step 5 Gross Income				
1. Wages, salaries, tips, etc..... 1.	_____	_____	_____	_____
2. Taxable interest income. If more than \$1,500, complete Sch. B 2.	_____	_____	_____	_____
3. Ordinary dividend income. If more than \$1,500, complete Sch. B..... 3.	_____	_____	_____	_____
4. Alimony received..... 4.	_____	_____	_____	_____
5. Business income/(loss). See instructions..... 5.	_____	_____	_____	_____
6. Capital gain/(loss). See instructions 6.	_____	_____	_____	_____
7. Other gains/(losses). See instructions..... 7.	_____	_____	_____	_____
8. Taxable IRA distributions..... 8.	_____	_____	_____	_____
9. Taxable pensions and annuities..... 9.	_____	_____	_____	_____
10. Rents, royalties, partnerships, estates, etc. See instructions10.	_____	_____	_____	_____
11. Farm income/(loss). See instructions11.	_____	_____	_____	_____
12. Unemployment compensation. See instructions12.	_____	_____	_____	_____
13. Gambling winnings13.	_____	_____	_____	_____
14. Other income, bonus depreciation, and section 179 adjustment14.	_____	_____	_____	_____
15. Gross Income. Add lines 1-14..... 15.	_____	_____	_____	_____

NOTE: Use only blue or black ink, no pencils or red ink.

Step 6 Adjustments to Income				
16. Payments to an IRA, Keogh, or SEP.....16.	_____	_____	_____	_____
17. Deductible part of self-employment tax.....17.	_____	_____	_____	_____
18. Health insurance premium.....18.	_____	_____	_____	_____
19. Penalty on early withdrawal of savings19.	_____	_____	_____	_____
20. Alimony paid20.	_____	_____	_____	_____
21. Pension/retirement income exclusion.....21.	_____ ▲	_____	_____	_____
22. Moving expense deduction from federal form 390322.	_____	_____	_____	_____
23. Iowa capital gain deduction; Include corresponding IA 100 schedule.....23.	_____ ▲	_____	_____	_____
24. Other adjustments24.	_____	_____	_____	_____
25. Total adjustments. Add lines 16-24..... 25.	_____	_____	_____ ▲	_____
26. Net Income. Subtract line 25 from line 15..... 26.	_____	_____	_____ ▲	_____

Step 7 Federal Taxes and Qualified Deductions				
27. Federal income tax refund/overpayment received in 2019.....27.	_____ ▲	_____	_____	_____
28. Self-employment/household employment/other federal taxes28.	_____ ▲	_____	_____	_____
29. Addition for federal taxes. Add lines 27 and 28..... 29.	_____	_____	_____	_____
30. Total. Add lines 26 and 29..... 30.	_____	_____	_____	_____
31. Federal tax withheld in 2019, federal estimated tax payments made in 2019, and federal taxes paid in 2019 for 2018 and prior years..... 31.	_____ ▲	_____	_____	_____
32. Qualified business income deduction. 25.0% (.25) of federal amount. See instructions 32.	_____ ▲	_____	_____	_____
33. DPAD 199A(g) deduction. 25.0% (.25) of federal amount..... 33.	_____ ▲	_____	_____	_____
34. Total federal tax and other qualified deductions. Add lines 31, 32, and 33..... 34.	_____	_____	_____	_____
35. Balance. Subtract line 34 from line 30. Enter here and on line 36, page 2..... 35.	_____	_____	_____ ▲	_____



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	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
Step 8 Taxable Income				
36. BALANCE. From side 1, line 35.....			36. _____	_____
37. Deduction. Check one box <input type="checkbox"/> Itemized.(Include IA Schedule A) <input type="checkbox"/> Standard <input type="checkbox"/>			37. _____	_____
38. TAXABLE INCOME. SUBTRACT line 37 from line 36.....			38. _____	_____
Step 9 Tax, Credits, and Check-off Contributions				
39. Tax from tables or alternate tax.....	39. _____	_____	_____	_____
40. Iowa lump-sum tax. See instructions.....	40. _____	_____	_____	_____
41. Iowa alternative minimum tax. Include IA 6251.....	41. _____	_____	_____	_____
42. Total tax. ADD lines 39, 40, and 41.....	42. _____	_____	_____	_____
43. Total exemption credit amount(s) from Step 3, side 1.....	43. _____	_____	_____	_____
44. Tuition and textbook credit for dependents K-12.....	44. _____	_____	_____	_____
45. Volunteer firefighter/EMS/reserve peace officer credit.....	45. _____	_____	_____	_____
46. Total credits. ADD lines 43, 44, and 45.....	46. _____	_____	_____	_____
47. BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero.....	47. _____	_____	_____	_____
48. Credit for nonresident or part-year resident. Include IA 126 and federal return.....	48. _____	_____	_____	_____
49. BALANCE. SUBTRACT line 48 from line 47. If less than zero, enter zero.....	49. _____	_____	_____	_____
50. Out-of-state tax credit. Include IA 130.....	50. _____	_____	_____	_____
51. BALANCE. SUBTRACT line 50 from line 49. If less than zero, enter zero.....	51. _____	_____	_____	_____
52. Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule.....	52. _____	_____	_____	_____
53. BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero.....	53. _____	_____	_____	_____
54. School district surtax or EMS surtax. Take percentage from table; multiply by line 53.....	54. _____	_____	_____	_____
55. Total state and local tax. ADD lines 53 and 54.....	55. _____	_____	_____	_____
56. TOTAL state and local tax before contributions. Combine columns A and B on line 55 and enter here.....	56. _____	_____	_____	_____
57. Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.				
Fish/Wildlife 57a: <input type="checkbox"/> State Fair 57b: <input type="checkbox"/> Firefighters/Veterans 57c: <input type="checkbox"/> Child Abuse Prevention 57d: <input type="checkbox"/> Enter here.....			57. _____	_____
58. TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here.....	58. _____	_____	_____	_____
Step 10 Credits				
59. Iowa fuel tax credit. Include IA 4136.....	59. _____	_____	_____	_____
60. Check One: Child and dependent care credit <input type="checkbox"/> OR <input type="checkbox"/> <input type="checkbox"/> Early childhood development credit	60. _____	_____	_____	_____
61. Iowa earned income tax credit. 15.0% (.15) of federal credit.....	61. _____	_____	_____	_____
62. Other refundable credits. Include IA 148 Tax Credits Schedule.....	62. _____	_____	_____	_____
63. Iowa income tax withheld.....	63. _____	_____	_____	_____
64. Estimated and voucher payments made for tax year 2019.....	64. _____	_____	_____	_____
65. TOTAL. ADD lines 59 through 64 and enter here.....	65. _____	_____	_____	_____
66. TOTAL CREDITS. ADD columns A and B on line 65 and enter here.....	66. _____	_____	_____	_____
Step 11 Refund				
67. If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid.....	67. _____	_____	_____	_____
68. Amount of line 67 to be REFUNDED.....	68. _____	_____	_____	_____
68a. Routing Number: <input type="text"/>	68b. Type	Checking <input type="checkbox"/>	Savings <input type="checkbox"/>	
68c. Account Number: <input type="text"/>				
69. Amount of line 67 to be applied to your 2020 estimated tax.....	69. _____	_____	_____	_____
Step 12 Pay				
70. If line 66 is less than line 58, subtract line 66 from line 58. This is the AMOUNT OF TAX YOU OWE.....	70. _____	_____	_____	_____
71. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F. Check if annualized income method is used. <input type="checkbox"/>	71. _____	_____	_____	_____
72. Penalty and interest <input type="checkbox"/> 72a. Penalty _____ <input type="checkbox"/> 72b. Interest _____ ADD. Enter total.....	72. _____	_____	_____	_____
73. TOTAL AMOUNT DUE. ADD lines 70, 71, and 72. Enter here.....	73. _____	_____	_____	_____

Step 13 I, the undersigned, declare under penalties of perjury or false certificate, that I have examined this return, and, to the best of my knowledge and belief, it is true, correct, and complete.

SIGN HERE	<input type="checkbox"/>				
Your Signature	Date	Check if Deceased	Date of Death	Preparer's Signature	Date
SIGN HERE	<input type="checkbox"/>				
Spouse's Signature	Date	Check if Deceased	Date of Death	Preparer's PTIN	Firm's FEIN
			Daytime Telephone Number		Daytime Telephone Number

**This return is due April 30th, 2020. Sign, enclose W-2s, and verify SSNs.
 MAILING ADDRESS: Iowa Income Tax Document Processing,
 PO BOX 9187, Des Moines IA 50306-9187
 Make check payable to Treasurer, State of Iowa**

