

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 No	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.
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

a.	Personal Credit: Col. A: Enter 1 (enter 2 if filing status 2 or 5); Col. B: Enter 1 if filing status 3	B. Spouse (Filing Status 3 ONLY)	A. You or Joint
b.	Enter 1 for each taxpayer who is 65 or older and/or 1 for each taxpayer who is blind		
c.	Dependents: Enter 1 for each dependent		
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
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Step 5 Gross Income

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

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		
17.	Deductible part of self-employment tax		
18.	Health insurance premium		
19.	Penalty on early withdrawal of savings		
20.	Alimony paid		
21.	Pension/retirement income exclusion		
22.	Moving expense deduction from federal form 3903		
23.	Iowa capital gain deduction; Include corresponding IA 100 schedule		
24.	Other adjustments		
25.	Total adjustments. Add lines 16-24		
26.	Net Income. Subtract line 25 from line 15		

Step 7 Federal Taxes and Qualified Deductions

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



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Step 8
Taxable
Income

Step 9 Tax, Credits, and Check- off Contri- butions

Step 10 Credits

Step 11 Refund

Step 12
Pay

Step 13

**SIGN
HERE**

**SIGN
HERE**

B. Spouse/Status 3

A. You or Join

B. Spouse/Status 3

A. You or Joint

36.	BALANCE. From side 1, line 35.....	36.	_____	.00	_____	.00	
37.	Deduction. Check one box ☒ Itemized.(Include IA Schedule A) ☐ Standard ☐	37.	_____	.00	▲	_____	
38.	TAXABLE INCOME. SUBTRACT line 37 from line 36.....	38.	_____	.00	_____	.00	
39.	Tax from tables or alternate tax.....	39.	_____	.00	▲	_____	
40.	Iowa lump-sum tax. See instructions.....	40.	_____	.00	▲	_____	
41.	Iowa alternative minimum tax. Include IA 6251.....	41.	_____	.00	▲	_____	
42.	Total tax. ADD lines 39, 40, and 41.....	42.	_____	.00	_____	.00	
43.	Total exemption credit amount(s) from Step 3, side 1.....	43.	_____	.00	_____	.00	
44.	Tuition and textbook credit for dependents K-12.....	44.	_____	.00	▲	_____	
45.	Volunteer firefighter/EMS/reserve peace officer credit.....	45.	_____	.00	▲	_____	
46.	Total credits. ADD lines 43, 44, and 45.....	46.	_____	.00	_____	.00	
47.	BALANCE. SUBTRACT line 46 from line 42. If less than zero, enter zero.....	47.	_____	.00	▲	_____	
48.	Credit for nonresident or part-year resident. Include IA 126 and federal return.....	48.	_____	.00	▲	_____	
49.	BALANCE. SUBTRACT line 48 from line 47. If less than zero, enter zero.....	49.	_____	.00	▲	_____	
50.	Out-of-state tax credit. Include IA 130.....	50.	_____	.00	▲	_____	
51.	BALANCE. SUBTRACT line 50 from line 49. If less than zero, enter zero.....	51.	_____	.00	▲	_____	
52.	Other nonrefundable Iowa credits. Include IA 148 Tax Credits Schedule.....	52.	_____	.00	▲	_____	
53.	BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero.....	53.	_____	.00	▲	_____	
54.	School district surtax or EMS surtax. Take percentage from table; multiply by line 53.....	54.	_____	.00	▲	_____	
55.	Total state and local tax. ADD lines 53 and 54.....	55.	_____	.00	▲	_____	
56.	TOTAL state and local tax before contributions. Combine columns A and B on line 55 and enter here.....	56.	_____	.00	_____	.00	
57.	Contributions will reduce your refund or add to the amount you owe. Amounts must be in whole dollars.						
Fish/Wildlife 57a: ▲	_____	State Fair 57b: ▲	_____	Firefighters/Veterans 57c: ▲	_____	Child Abuse Prevention 57d: ▲	_____
57.	Enter here.....	57.	_____	.00	_____	.00	
58.	TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here.....	58.	▲	_____	_____	.00	

59.	Iowa fuel tax credit. Include IA 4136	59.	_____	.00	▲	_____	.00
60.	Check One: Child and dependent care credit ☐ OR						
	▲ Early childhood development credit ☐	60.	_____	.00	▲	_____	.00
61.	Iowa earned income tax credit. 15.0% (.15) of federal credit	61.	_____	.00	▲	_____	.00
62.	Other refundable credits. Include IA 148 Tax Credits Schedule.	62.	_____	.00	▲	_____	.00
63.	Iowa income tax withheld.	63.	_____	.00	▲	_____	.00
64.	Estimated and voucher payments made for tax year 2019.	64.	_____	.00	▲	_____	.00
65.	TOTAL. ADD lines 59 through 64 and enter here.....	65.	_____	.00	▲	_____	.00
66.	TOTAL CREDITS. ADD columns A and B on line 65 and enter here	66.					

67. If line 66 is more than line 58, subtract line 58 from line 66. This is the amount you overpaid.....		67. ▲ _____ .00
68. Amount of line 67 to be REFUNDED.....REFUND		68. ▲ _____ .00
68a. Routing Number:		68b. Type Checking ☐ Savings ☐
68c. Account Number:		
69. Amount of line 67 to be applied to your 2020 estimated tax.69.		_____ .00 ▲ _____ .00

70. If line 66 is less than line 58, subtract line 66 from line 58. This is the AMOUNT OF TAX YOU OWE.....	70.	▲		.00
71. Penalty for underpayment of estimated tax from IA 2210, IA 2210S, or IA 2210F. Check if annualized income method is used. ▲ ☐	71.	▲		.00
72. Penalty and interest ▲ 72a. Penalty <u> </u> .00 ▲ 72b. Interest <u> </u> .00 ADD. Enter total.	72.	▲		.00
73. TOTAL AMOUNT DUE. ADD lines 70, 71, and 72. Enter here..... PAY THIS AMOUNT	73.	▲		.00

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.

Your Signature	Date	Check if Deceased ☐	Date of Death	Preparer's Signature	Date
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



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