

**EXAMPLE OF ACCEPTABLE TAX DOCUMENTS-NOT FOR ACTUAL USE!!!!!!**

Form <b>1040A</b>		Department of the Treasury—Internal Revenue Service		<b>2009</b>		IRS Use Only—Do not write or staple in this space.	
<b>U.S. Individual Income Tax Return (99)</b>							
<b>Label</b> (See page 17.)  <b>Use the IRS label.</b>  Otherwise, please print or type.	LABEL HERE	Your first name and initial		Last name		OMB No. 1545-0074	
		If a joint return, spouse's first name and initial		Last name		Your social security number	
		Home address (number and street). If you have a P.O. box, see page 17.		Apt. no.		Spouse's social security number	
		City, town or post office, state, and ZIP code. If you have a foreign address, see page 17.				You must enter your SSN(s) above.	
<b>Presidential Election Campaign</b>		Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 17) <input type="checkbox"/> You <input type="checkbox"/> Spouse					
<b>Filing status</b> Check only one box.		1 <input type="checkbox"/> Single 2 <input type="checkbox"/> Married filing jointly (even if only one had income) 3 <input type="checkbox"/> Married filing separately. Enter spouse's SSN above and full name here.					
		4 <input type="checkbox"/> Head of household (with qualifying person). (See page 18.) If the qualifying person is a child but not your dependent, enter this child's name here.					
		5 <input type="checkbox"/> Qualifying widow(er) with dependent child (see page 19)					
<b>Exemptions</b>		6a <input type="checkbox"/> Yourself. If someone can claim you as a dependent, do not check box 6a. b <input type="checkbox"/> Spouse c <b>Dependents:</b>					
If more than six dependents, see page 20.		(1) First name		(2) Dependent's social security number		(3) Dependent's relationship to you	
						(4) <input checked="" type="checkbox"/> If qualifying child for child tax credit (see page 20)	
						Boxes checked on 6a and 6b No. of children on 6c who: • lived with you • did not live with you due to divorce or separation (see page 21) Dependents on 6c not entered above Add numbers on lines above	
d Total number of exemptions claimed:							
<b>Income</b>		7 Wages, salaries, tips, etc. Attach Form(s) W-2. 7					
Attach Form(s) W-2 here. Also attach Form(s) 1099-R if tax was withheld.		8a Taxable interest. Attach Schedule B if required. 8a					
		b Tax-exempt interest. Do not include on line 8a. 8b					
		9a Ordinary dividends. Attach Schedule B if required. 9a					
		b Qualified dividends (see page 25). 9b					
		10 Capital gain distributions (see page 25). 10					
		11a IRA distributions. 11a		11b Taxable amount (see page 25). 11b			
		12a Pensions and annuities. 12a		12b Taxable amount (see page 26). 12b			
		13 Unemployment compensation in excess of \$2,400 per recipient and Alaska Permanent Fund dividends (see page 28). 13					
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		15 Add lines 7 through 14b (far right column). This is your <b>total income</b> . 15					
<b>Adjusted gross income</b>		16 Educator expenses (see page 30). 16					
		17 IRA deduction (see page 30). 17					
		18 Student loan interest deduction (see page 32). 18					
		19 Tuition and fees deduction. Attach Form 8917. 19					
		20 Add lines 16 through 19. These are your <b>total adjustments</b> . 20					
		21 Subtract line 20 from line 15. This is your <b>adjusted gross income</b> . 21					

## Page 2

Form 1040A (2009)

Form 1040A (2009)

**EXAMPLE OF ACCEPTABLE TAX DOCUMENTS-NOT FOR ACTUAL USE!!!!!!**

Form	1040	Department of the Treasury—Internal Revenue Service <b>U.S. Individual Income Tax Return</b>	2009	(99) IRS Use Only—Do not write or staple in this space.	OMB No. 1545-0074																																																																																				
<b>Label</b> (See instructions on page 14.) <b>Use the IRS label.</b> Otherwise, please print or type.		For the year Jan. 1–Dec. 31, 2009, or other tax year beginning _____, 2009, ending _____, 20																																																																																							
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		If a joint return, spouse's first name and initial _____ Last name _____		Spouse's social security number _____																																																																																					
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# EXAMPLE OF ACCEPTABLE TAX DOCUMENTS-NOT FOR ACTUAL USE!!!!!!

Page 2

Form 1040 (2009)

## Tax and Credits

### Standard Deduction for—

• People who check any box on line 39a, 39b, or 40b or who can be claimed as a dependent, see page 35.  
• All others:  
Single or Married filing separately, \$5,700  
Married filing jointly or Qualifying widow(er), \$11,400  
Head of household, \$8,350

38 Amount from line 37 (adjusted gross income)

39a Check ☐ You were born before January 2, 1945, ☐ Blind. ☐ Spouse was born before January 2, 1945, ☐ Blind. Total boxes checked ▶ 39a

b If your spouse itemizes on a separate return or you were a dual-status alien, see page 35 and check here ▶ 39b

40a Itemized deductions (from Schedule A) or your standard deduction (see left margin)

b If you are increasing your standard deduction by certain real estate taxes, new motor vehicle taxes, or a net disaster loss, attach Schedule L and check here (see page 35) ▶ 40b

41 Subtract line 40a from line 38

42 Exemptions. If line 38 is \$125,100 or less and you did not provide housing to a Midwestern displaced individual, multiply \$3,650 by the number on line 6d. Otherwise, see page 37

43 Taxable income. Subtract line 42 from line 41. If line 42 is more than line 41, enter -0-

44 Tax (see page 37). Check if any tax is from: a ☐ Form(s) 8814 b ☐ Form 4972

45 Alternative minimum tax (see page 40). Attach Form 6251

46 Add lines 44 and 45

47 Foreign tax credit. Attach Form 1116 if required

48 Credit for child and dependent care expenses. Attach Form 2441

49 Education credits from Form 8863, line 29

50 Retirement savings contributions credit. Attach Form 8880

51 Child tax credit (see page 42)

52 Credits from Form: a ☐ 8396 b ☐ 8839 c ☐ 5695

53 Other credits from Form: a ☐ 3800 b ☐ 8801 c ☐

54 Add lines 47 through 53. These are your total credits

55 Subtract line 54 from line 46. If line 54 is more than line 46, enter -0-

## Other Taxes

56 Self-employment tax. Attach Schedule SE

57 Unreported social security and Medicare tax from Form: a ☐ 4137 b ☐ 8919

58 Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required

59 Additional taxes: a ☐ AEIC payments b ☐ Household employment taxes. Attach Schedule H

60 Add lines 55 through 59. This is your total tax

## Payments

If you have a qualifying child, attach Schedule EIC.

61 Federal income tax withheld from Forms W-2 and 1099

62 2009 estimated tax payments and amount applied from 2008 return

63 Making work pay and government retiree credits. Attach Schedule M

64a Earned income credit (EIC)

b Nontaxable combat pay election 64b

65 Additional child tax credit. Attach Form 8812

66 Refundable education credit from Form 8863, line 16

67 First-time homebuyer credit. Attach Form 5405

68 Amount paid with request for extension to file (see page 72)

69 Excess social security and tier 1 RRTA tax withheld (see page 72)

70 Credits from Form: a ☐ 2439 b ☐ 4136 c ☐ 8801 d ☐ 8885

71 Add lines 61, 62, 63, 64a, and 65 through 70. These are your total payments

## Refund

Direct deposit? See page 73 and fill in 73b, 73c, and 73d, or Form 8888.

72 If line 71 is more than line 60, subtract line 60 from line 71. This is the amount you overpaid

73a Amount of line 72 you want refunded to you. If Form 8888 is attached, check here ▶ ☐ c Type: ☐ Checking ☐ Savings

b Routing number

d Account number

74 Amount of line 72 you want applied to your 2010 estimated tax ▶ 74

## Amount You Owe

75 Amount you owe. Subtract line 71 from line 60. For details on how to pay, see page 74 ▶ 75

76 Estimated tax penalty (see page 74) 76

## Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 75)? ☐ Yes. Complete the following. ☐ No

Designee's name ▶ Phone no. ▶ Personal identification number (PIN) ▶

## Sign Here

Joint return? See page 15. Keep a copy for your records.

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.

Your signature ▶ Date ▶ Your occupation ▶ Daytime phone number ▶

Spouse's signature. If a joint return, both must sign. ▶ Date ▶ Spouse's occupation ▶

## Paid Preparer's Use Only

Preparer's signature ▶ Date ▶ Check if self-employed ☐

Firm's name (or yours if self-employed), address, and ZIP code ▶ EIN ▶ Phone no. ▶

# EXAMPLE OF ACCEPTABLE TAX DOCUMENTS-NOT FOR ACTUAL USE!!!!!!

Department of the Treasury—Internal Revenue Service

Form

**1040EZ**

## Income Tax Return for Single and Joint Filers With No Dependents (99) 2009

OMB No. 1545-0074

### Label

(See page 9.)

Use the  
IRS label.

Otherwise,  
please print  
or type.

Presidential  
Election  
Campaign  
(see page 9)

L  
A  
B  
E  
L  
  
H  
E  
R  
E

Your first name and initial

Last name

Your social security number

If a joint return, spouse's first name and initial

Last name

Spouse's social security number

Home address (number and street). If you have a P.O. box, see page 9.

Apt. no.

▲ You must enter  
your SSN(s) above. ▲

City, town or post office, state, and ZIP code. If you have a foreign address, see page 9.

Checking a box below will not  
change your tax or refund.

Check here if you, or your spouse if a joint return, want \$3 to go to this fund . . . ☐ You ☐ Spouse

### Income

Attach  
Form(s) W-2  
here.

Enclose, but do  
not  
attach, any  
payment.

You may benefit  
from filing Form  
1040A or 1040.  
See *Before You  
Begin* on page 4.

1 Wages, salaries, and tips. This should be shown in box 1 of your Form(s) W-2.

Attach your Form(s) W-2.

1

2 Taxable interest. If the total is over \$1,500, you cannot use Form 1040EZ.

2

3 Unemployment compensation in excess of \$2,400 per recipient and Alaska Permanent  
Fund dividends (see page 11).

3

4 Add lines 1, 2, and 3. This is your **adjusted gross income**.

4

5 If someone can claim you (or your spouse if a joint return) as a dependent, check  
the applicable box(es) below and enter the amount from the worksheet on back.

☐ You

☐ Spouse

If no one can claim you (or your spouse if a joint return), enter \$9,350 if **single**;  
\$18,700 if **married filing jointly**. See back for explanation.

5

6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter -0-.

This is your **taxable income**.

6

### Payments, Credits, and Tax

7 Federal income tax withheld from Form(s) W-2 and 1099.

7

8 Making work pay credit (see worksheet on back).

8

9a Earned income credit (EIC) (see page 13).

9a

b Nontaxable combat pay election.

9b

10 Add lines 7, 8, and 9a. These are your **total payments and credits**.

10

11 Tax. Use the amount on line 6 above to find your tax in the tax table on pages 27  
through 35 of the instructions. Then, enter the tax from the table on this line.

11

### Refund

Have it directly  
deposited! See  
page 18 and fill in  
12b, 12c,  
and 12d or  
Form 8888.

12a If line 10 is larger than line 11, subtract line 11 from line 10. This is your **refund**.

If Form 8888 is attached, check here ☐

12a

► b Routing number  ► c Type: ☐ Checking ☐ Savings

► d Account number

### Amount you owe

13 If line 11 is larger than line 10, subtract line 10 from line 11. This is

the **amount you owe**. For details on how to pay, see page 19.

13

### Third party designee

Do you want to allow another person to discuss this return with the IRS (see page 20)?

☐ Yes. Complete the following. ☐ No

Designee's  
name

Phone  
no.

Personal identification  
number (PIN)

### Sign here

Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct, and  
accurately lists all amounts and sources of income I received during the tax year. Declaration of preparer (other than the taxpayer) is based  
on all information of which the preparer has any knowledge.

Joint return? See  
page 6.

Your signature

Date

Your occupation

Daytime phone number

Keep a copy for  
your records.

Spouse's signature. If a joint return, both must sign.

Date

Spouse's occupation

### Paid preparer's use only

Preparer's  
signature

Date

Check if  
self-employed ☐

Preparer's SSN or PTIN

Firm's name (or  
yours if self-employed),  
address, and ZIP code

EIN

Phone no.