

Step 1
Name and address

Your first name and initial (if joint return, also give spouse's name and initial) Last name Your social security no.
Present home address Spouse's social security no.
City, town or post office, State, and ZIP code Your occupation Spouse's occupation

Step 2
Filing status and Exemptions

Presidential Election Campaign Fund Do you want \$1 to go to this fund?
1 Single (See if you can use Form 1040EZ.)
2 Married filing joint return (even if only one had income)
3 Married filing separate return. Enter spouse's social security no. above and full name here.
4 Head of household (with qualifying person). If the qualifying person is your unmarried child but not your dependent, write this child's name here.
Always check the exemption box labeled Yourself. Check other boxes if they apply.
5a Yourself 65 or over Blind
b Spouse 65 or over Blind
c First names of your dependent children who lived with you
d Other dependents: (1) Name (2) Relationship (3) Number of months lived in your home. (4) Did dependent have income of \$1,000 or more? (5) Did you provide more than one-half of dependent's support?
e Total number of exemptions claimed.

Step 3
Adjusted gross income

6 Wages, salaries, tips, etc. (Attach Forms W-2).
7 Interest income (Complete page 2 if over \$400 or you have any All-Savers interest).
8a Dividends (Complete page 2 if over \$400) 8b Exclusion Subtract line 8b from 8a 8c
9a Unemployment compensation (insurance). Total from Form(s) 1099-UC
b Taxable amount, if any, from worksheet on page 16 of Instructions. 9b
10 Add lines 6, 7, 8c, and 9b. This is your total income. 10
11 Deduction for a married couple when both work. Complete the worksheet on page 17. 11
12 Subtract line 11 from line 10. This is your adjusted gross income. 12

Step 4
Taxable income

13 Allowable part of your charitable contributions. Complete the worksheet on page 18. 13
14 Subtract line 13 from line 12. 14
15 Multiply \$1,000 by the total number of exemptions claimed in box 5e. 15
16 Subtract line 15 from line 14. This is your taxable income. 16

Step 5
Tax, credits, and payments

17a Partial credit for political contributions. See page 19. 17a
b Total Federal income tax withheld, from W-2 form(s). (If line 6 is more than \$32,400, see page 19.) 17b
Stop Here and Sign Below if You Want IRS to Figure Your Tax
c Earned income credit, from worksheet on page 21. 17c
18 Add lines 17a, b, and c. These are your total credits and payments. 18
19a Find tax on amount on line 16. Use tax table, pages 26-31. 19a
b Advance EIC payment (from W-2 form(s)). 19b
20 Add lines 19a and 19b. This is your total tax. 20

Step 6
Refund or amount you owe

21 If line 18 is larger than line 20, subtract line 20 from line 18. Enter the amount to be refunded to you. 21
22 If line 20 is larger than line 18, subtract line 18 from line 20. Enter the amount you owe. Attach payment for full amount payable to "Internal Revenue Service." 22

Step 7
Sign your return

I have read this return and any attachments filed with it. Under penalties of perjury, I declare that to the best of my knowledge and belief, the return and attachments are correct and complete.

Your signature Date Spouse's signature (If filing jointly, BOTH must sign)
Paid preparer's signature Date Check if self-employed Preparer's social security no.
Firm's name (or yours, if self-employed) Address and Zip code E.I. no.

Caution: You may **NOT** file Form 1040A (you must file Form 1040 instead) if any of the following apply to you:

- You could be claimed as a dependent on your parent's return AND had interest, dividends, or other unearned income of \$1,000 or more.
- You had a foreign financial account or were a grantor of, or transferor to, a foreign trust.
- You received interest or dividends as a nominee (in your name) for someone else.
- You received or paid accrued interest on securities transferred between interest payment dates.
- You received capital gain distributions or nontaxable distributions.
- You are choosing to exclude qualified reinvested dividends from a qualified public utility.

Note: You may also be required to file Form 1040 for other reasons. See pages 4 through 6 of instructions.

Part I Interest income

You must complete this part if you received over \$400 in interest income, OR you received any interest from an All-Savers Certificate (ASC). Use lines 1 and 2 to report interest income other than ASC interest. Use lines 3 through 6 to report ASC interest. Use line 7 to add the totals from lines 2 and 6.

Interest income from sources other than All-Savers Certificates. (See page 14)

1 List names of payers	Amount
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.

2 Add amounts on line 1. This is your total interest from other than ASCs. 2 .

Interest income from All-Savers Certificates. (See page 14)

3 List names of payers	Amount
_____	\$.
_____	\$.
_____	\$.

4 Add amounts on line 3. 4 .

5 Write the amount of your ASC exclusion from the worksheet on page 14 of the instructions. 5 .

6 Subtract line 5 from line 4. This is your taxable ASC interest. 6 .

7 Add lines 2 and 6 and write your answer here. This is your total taxable interest. Also write this amount on line 7 of Form 1040A. 7 .

Part II Dividend income

You must complete this part if you received over \$400 in ordinary dividends. See page 15 for information on the dividend exclusion.

8 List names of payers	Amount
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.
_____	\$.

9 Add amounts on line 8. Write your answer here and on line 8a of Form 1040A. 9 .