

# 2020 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 were 65 or older as of 12/31/20. <input type="checkbox"/>
3	Married filing separately on this combined return. Spouse use column B.	Residence on 12/31/20: 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 13 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
<b>Step 5 Gross Income</b>				
1. Wages, salaries, tips, etc .....	1. _____	1. _____		
2. Taxable interest income. If more than \$1,500, complete Sch. B .....	2. _____	2. _____		
3. Ordinary dividend income. If more than \$1,500, complete Sch. B .....	3. _____	3. _____		
4. Taxable alimony received .....	4. _____	4. _____		
5. Business income/(loss). See instructions .....	5. _____	5. _____		
6. Capital gain/(loss). See instructions .....	6. _____	6. _____		
7. Other gains/(losses). See instructions .....	7. _____	7. _____		
8. Taxable IRA distributions .....	8. _____	8. _____		
9. Taxable pensions and annuities.....	9. _____	9. _____		
10. Rents, royalties, partnerships, estates, etc. See instructions .....	10. _____	10. _____		
11. Farm income/(loss). See instructions .....	11. _____	11. _____		
12. Unemployment compensation. See instructions .....	12. _____	12. _____		
13. Gambling winnings .....	13. _____	13. _____		
14. Other income, bonus depreciation, and section 179 adjustment .....	14. _____	14. _____		
15. Gross Income. Add lines 1-14 .....	15. _____	15. _____	15. _____	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. _____	16. _____		
17. Deductible part of self-employment tax .....	17. _____	17. _____		
18. Health insurance premium .....	18. _____	18. _____		
19. Penalty on early withdrawal of savings .....	19. _____	19. _____		
20. Alimony paid .....	20. _____	20. _____		
21. Pension/retirement income exclusion.....	21. _____ ▲	21. _____		
22. Moving expense deduction from federal form 3903.....	22. _____	22. _____		
23. Iowa capital gain deduction; Include corresponding IA 100 schedule .....	23. _____ ▲	23. _____		
24. Other adjustments .....	24. _____	24. _____		
25. Total adjustments. Add lines 16-24 .....	25. _____	25. _____	25. _____	25. _____
26. Net Income. Subtract line 25 from line 15 .....	26. _____	26. _____	26. _____	26. _____

## Step 7 Federal Taxes and Qualified Deductions

27. Federal income tax refund/overpayment received in 2020 .....	27. _____	27. _____		
28. Self-employment/household employment/other federal taxes .....	28. _____	28. _____		
29. Addition for federal taxes. Add lines 27 and 28 .....	29. _____	29. _____		
30. Total. Add lines 26 and 29 .....	30. _____	30. _____		
31. Federal tax withheld in 2020, federal estimated tax payments made in 2020, and federal taxes paid in 2020 for 2019 and prior years .....	31. _____ ▲	31. _____		
32. Qualified business income deduction. 25.0% (.25) of federal amount. See instructions .....	32. _____ ▲	32. _____		
33. DPAD 199A(g) deduction. 25.0% (.25) of federal amount.....	33. _____ ▲	33. _____		
34. Total federal tax and other qualified deductions. Add lines 31, 32, and 33 .....	34. _____	34. _____		
35. Balance. Subtract line 34 from line 30. Enter here and on line 36, page 2 .....	35. _____	35. _____		



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	B. Spouse/Status 3	A. You or Joint	B. Spouse/Status 3	A. You or Joint
<b>Step 8 Taxable Income</b>				
36. BALANCE. From side 1, line 35		36.	.00	.00
37. Deduction. Check one box <input type="checkbox"/> Itemized.(Include IA Schedule A) <input type="checkbox"/> Standard <input type="checkbox"/>		37.	.00	.00
38. TAXABLE INCOME. SUBTRACT line 37 from line 36		38.	.00	.00
<b>Step 9 Tax, Credits, and Check-off Contributions</b>				
39. Tax from tables or alternate tax	.00		.00	
40. Iowa lump-sum tax. See instructions	.00		.00	
41. Iowa alternative minimum tax. Include IA 6251	.00		.00	
42. Total tax. ADD lines 39, 40, and 41		42.	.00	.00
43. Total exemption credit amount(s) from Step 3, side 1	.00		.00	
44. Tuition and textbook credit for dependents K-12	.00		.00	
45. Volunteer firefighter/EMS/reserve peace officer credit	.00		.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	.00
48. Credit for nonresident or part-year resident. Must include IA 126 and federal return		48.	.00	.00
49. BALANCE. SUBTRACT line 48 from line 47. If less than zero, enter zero		49.	.00	.00
50. Out-of-state tax credit. Must include IA 130		50.	.00	.00
51. BALANCE. SUBTRACT line 50 from line 49. If less than zero, enter zero		51.	.00	.00
52. Other nonrefundable Iowa credits. Must include IA 148 Tax Credits Schedule		52.	.00	.00
53. BALANCE. SUBTRACT line 52 from line 51. If less than zero, enter zero		53.	.00	.00
54. School district surtax or EMS surtax. Take percentage from table; multiply by line 53		54.	.00	.00
55. Total state and local tax. ADD lines 53 and 54		55.	.00	.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: <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.		.00
58. TOTAL STATE AND LOCAL TAX, AND CONTRIBUTIONS. Add line 56 and line 57 and enter here		58.		.00
<b>Step 10 Credits</b>				
59. Iowa fuel tax credit. Include IA 4136	.00		.00	
60. Check One: Child and dependent care credit <input type="checkbox"/> OR <input type="checkbox"/> Early childhood development credit		60.	.00	.00
61. Iowa earned income tax credit. 15.0% (.15) of federal credit	.00		.00	
62. Other refundable credits. Include IA 148 Tax Credits Schedule	.00		.00	
63. Iowa income tax withheld	.00		.00	
64. Estimated and voucher payments made for tax year 2020	.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.		.00
<b>Step 11 Refund</b>				
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: <input type="text"/>		68b. Type <input type="checkbox"/> Checking <input type="checkbox"/> Savings <input type="checkbox"/>		
68c. Account number: <input type="text"/>				
69. Amount of line 67 to be applied to your 2021 estimated tax	.00		.00	
<b>Step 12 Pay</b>				
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 <input type="checkbox"/>		71.		.00
72. Penalty and interest <input type="checkbox"/> 72a. Penalty <input type="text"/> .00 <input type="checkbox"/> 72b. Interest <input type="text"/> .00 ADD. Enter total		72.		.00
73. TOTAL AMOUNT DUE. ADD lines 70, 71, and 72. Enter here		PAY THIS AMOUNT 73.		.00

**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.

<b>SIGN HERE</b>	<input type="checkbox"/>				
Your signature	Date	Check if deceased	Date of death	Preparer's signature	Date
<b>SIGN HERE</b>	<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 30, 2021. 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 Iowa Department of Revenue**

