

FORM 40A Alabama 2023 Individual Income Tax Return FULL YEAR RESIDENTS ONLY



For the year Jan. 1 - Dec. 31, 2023, or other tax year:

Beginning: Ending: Your social security number Spouse's SSN if joint return. Check if primary is deceased. Check if spouse is deceased. Your first name Spouse's first name. Present home address. City, town, or post office. State ZIP code. Check if address is outside U.S.

CHECK BOX IF AMENDED RETURN

Filing Status/ Exemptions. 1 \$1,500 Single. 3 \$1,500 Married filing separate. Complete Spouse SSN. NRA. 2 \$3,000 Married filing joint. 4 \$3,000 Head of Family (with qualifying person).

Income and Adjustments table. 5a Alabama Income Tax Withheld. 5b Wages, salaries, tips, etc. 6 Interest and dividend income. 7 Total income. Add lines 5b and 6 (column B).

Deductions table. 8 Standard Deduction. 9 Federal tax deduction. DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S). 10 Personal exemption. 11 Dependent exemptions. 12 Total deductions. Add lines 8, 9, 10, and 11.

Tax and Payments table. 13 Taxable income. Subtract line 12 from line 7. Enter the result. 14 Find the tax for the amount on line 13. 15 Consumer Use Tax. 16 You may make a voluntary contribution to: a Alabama Democratic Party. b Alabama Republican Party. 17 Total tax liability and voluntary contribution. Add lines 14, 15, 16a, and 16b. 18 Alabama income tax withheld. 19 Automatic Extension Payment. 20 Amended Returns Only - Previous payments. 21 Total payments. Add lines 18, 19, and 20. 22 Amended Returns Only - Previous refund. 23 Adjusted Total Payments. Subtract line 22 from line 21.

AMOUNT YOU OWE 24 If line 17 is larger than line 23, subtract line 23 from line 17, and enter AMOUNT YOU OWE. OVERPAID 25 If line 23 is larger than line 17, subtract line 17 from line 23, and enter AMOUNT OVERPAID. Donations 26 Total Donation Check-offs from page 2, Part IV, line 2. REFUND 27 REFUNDED TO YOU. Subtract line 26 from line 25. (You MUST SIGN this return before your refund can be processed.)

I authorize a representative of the Department of Revenue to discuss my return and attachments with my preparer. 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.

Sign Here In Black Ink. Your Signature, Date, Daytime Telephone Number, Your Occupation. Spouse's Signature (if joint return, BOTH must sign), Date, Daytime Telephone Number, Spouse's Occupation. Preparer's Signature, Date, Check if Self-employed, Preparer's SSN or PTIN, E.I. Number. Paid Preparer's Use Only. Firms's Name (or yours if self employed), Daytime Telephone No., ZIP Code, Address.



PART I 1 Were you (and your spouse, if married filing jointly) a resident of Alabama for the entire year 2023? Yes No

If you checked no, DO NOT COMPLETE THIS FORM. See "Which Form To File" on page 5 of instructions.

2 Did you file an Alabama income tax return for the year 2022? Yes No

If you checked no, state the reason for not filing.

3 Give name and address of your present employer:

Yourself

General Information

Your Spouse

All Taxpayers Must Complete This Section.

4 Your occupation

Spouse's occupation

5 Enter the Federal Adjusted Gross Income and Federal Taxable Income as reported on your 2023 Federal Individual Income Tax Return.

6 Do you have income which is reported on your Federal return, but not reported on your Alabama return? Yes No

If yes, enter source(s) and amount(s) below (other than state income tax refund):

Source Amount Source Amount Source Amount

PART II

Table with 4 columns: (1) First name, Last name, (2) Dependent's Social Security Number, (3) Dependent's Relationship to You, (4) Did you provide more than one-half dependent's support?

Dependents

Do not include yourself or your spouse

b Total number of dependents claimed above 1b

2 Amount allowed. Multiply the total number of dependents claimed on line 1b by the amount from the dependent chart below.

Use the following chart to determine the per-dependent exemption amount:

Chart with 2 columns: Amount on Line 7, Page 1, Dependent Exemption

Enter amount here and on page 1, line 11 2

PART III

Federal Tax

Liability Ded. 1 Enter the Federal Income Tax Liability from worksheet (see instructions) here and on line 9, page 1. 1

PART IV

1 You may donate all or part of your overpayment. (Enter the amount in the appropriate boxes.)

Donation Check-offs

Table with 2 columns: Donor/Check-off name, Amount

2 Total Donations. Add lines 1a, b, c, d, e, f, g, h, i, j, k, l, m, n, o, p, q, and r. Enter here and on page 1, line 26 2

Drivers License Info

DOB (mm/dd/yyyy) Your state DL# Iss date (mm/dd/yyyy) Exp date (mm/dd/yyyy)

WHERE TO FILE FORM 40A

If you are receiving a refund, Form 40A, line 27, mail your return to: Alabama Department of Revenue, P.O. Box 154, Montgomery, AL 36135-0001

Mail only your 2023 Form 40A to one of the above addresses. Prior year returns, amended returns, and all other correspondence should be mailed to Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.



**SCHEDULE**  
**W-2**  
(FORM 40, 40A, or 40NR)



**2023**

Alabama Department of Revenue  
**Wages, Salaries, Tips, etc.**

*Schedule W-2 must be completed fully and included with your return in order to receive proper credit for your Alabama income tax withheld. Attach a copy of all withholding statements to your return.*

NAME(S) AS SHOWN ON TAX RETURN

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.

	A Employee's Social Security Number	B Employer's Identification Number (EIN)	C Statutory Employee	D Schedule C/C-EZ Filed?	E State Code	F Alabama Employer's State ID Number	G Alabama State Income Tax Withheld	H Federal Wages (Box 1 of Form W-2)	I Alabama State Wages (Box 16 of Form W-2)	J Additional Taxable Wages - Other States	
1	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
2	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
3	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
4	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
5	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
6	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
7	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
8	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
9	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
10	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
11	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
12	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
13	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
14	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
15	•	•	• <input type="checkbox"/>	• <input type="checkbox"/>	•	•	•	•	•	•	
16	<b>TOTAL ALABAMA TAX WITHHELD FROM W-2s.</b> Total lines 1-15, Column G and enter the amount here . . .						•				
17	<b>ALABAMA TAX WITHHELD FROM 1099s AND W-2Gs.</b> Enter the total Alabama Income Tax Withheld from all Form 1099s and Form W-2Gs received. See instructions on where to report the income from these statements. . . . .						•				
18	<b>TOTAL WAGES AND TOTAL ALABAMA TAX WITHHELD FROM W-2s, 1099s, AND W-2Gs.</b> See instructions. . . . .						•	•	•	•	

**THIS SCHEDULE CAN ONLY BE SUBMITTED AND/OR PRINTED VIA LANDSCAPE**

# Federal Income Tax Deduction Worksheet

1 Enter the tax as shown on line 22 on 2023 Form 1040/Form 1040-SR/Form 1040NR. ....	<b>1</b>		00
2 Net Investment Income Tax. Enter amount from line 17, 2023 Form 8960. ....	<b>2</b>		00
3 Federal Tax. Add Lines 1 and 2. ....	<b>3</b>		00
<b>4a Earned Income Credit (EIC).</b> Enter the amount from line 27 of 2023 Form 1040/Form 1040-SR.	<b>4a</b>		00
<b>4b Additional Child Tax Credit.</b> Enter the amount from Line 28 of 2023 Form 1040/Form 1040-SR/1040-NR. ....	<b>4b</b>	...	00
<b>4c American Opportunity Credit.</b> Enter the amount from line 29 of 2023 Form 1040/Form 1040-SR.	<b>4c</b>		00
<b>4d Credits from Forms 2439.</b> Enter the amount from Schedule 3, Part II, line 13a of 2023 Form 1040/Form 1040-SR/Form 1040NR. ....	<b>4d</b>		00
5 Add lines 4a,b, c and d. ....	<b>5</b>		00
6 Subtract line 5 from line 3. If amount is negative enter zero also enter on line 12 of Form 40, line 9 of Form 40A or page 2, Part IV, line 4 of Form 40NR. ....	<b>6</b>		00