



2024

Alabama Department of Revenue Retirement Schedule ATTACH TO FORM 40 OR FORM 40NR

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

Schedule RS 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 (Form 1099-R) to your return.

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PA	ART I Retirement Distri	bution(s) Ex	empt from Alab	ama Income					
	A	В	С	D	E	F	G	Н	I
			Distribution			State			
	FEIN	IRA	Code(s)	Account Number	Gross Distribution	Code	State ID	Alabama Withheld	Reason Exempt
• 1									
• 2									
• 3									
• 4									
• 5									
• 6									
• 7									
• 8				bution(s) Exempt from Alabama Ir	ncome. Total lines 1-7, Column H	and enter the an	nount here and Part 5, line 1		
PA	ART II Primary's Fully o	r Partially Ta	axable Retireme	ent Distributions					
	A	В	С	D	E	F	G	Н	I
			Distribution			State			
	FEIN	IRA	Code(s)	Account Number	Gross Distribution	Code	State ID	Alabama Withheld	Taxable to Alabama
• 1									
• 2									
• 3									
• 4									
• 5									
• 6									
• 7									
• 8		.D from Pri	mary's Fully o	r Partially Taxable Retirement Dis	tributions. Total lines 1-7, Colum	n H and enter the	e amount here and Part 5, line 2		
	ALABAMA TAX WITHHEL						e amount here and Part 5, line 2	·····	
• 9	ALABAMA TAX WITHHEL RETIREMENT INCOME TA	AXABLE TO	ALABAMA. T		ne amount here				
• 9	ALABAMA TAX WITHHEL RETIREMENT INCOME TA RETIREMENT EXCLUSION	AXABLE TO N. Is the pri	ALABAMA. T	otal lines 1-7, Column I and enter th	ne amount hererement? • Yes • No				
• 9	ALABAMA TAX WITHHEL RETIREMENT INCOME TA RETIREMENT EXCLUSIO If "Yes", each taxpayer is	AXABLE TO N. Is the pri eligible up to	D ALABAMA. T mary taxpayer (o \$6,000 not to	otal lines 1-7, Column I and enter the 65 or older and receives taxable retires.	ne amount hererement? • ☐ Yes • ☐ No able to Alabama on line 9.				
• 9 •10	ALABAMA TAX WITHHEL RETIREMENT INCOME TA RETIREMENT EXCLUSIO If "Yes", each taxpayer is If "No", you do not qualify	AXABLE TO N. Is the pri eligible up to for this excl	D ALABAMA. To mary taxpayer to to \$6,000 not to usion. Stop and	otal lines 1-7, Column I and enter the 65 or older and receives taxable retinexceed the Retirement Income Taxable go to line 11. (See instructions for the first of the first	ne amount hererement? • ☐ Yes • ☐ No able to Alabama on line 9.				



ALABAMA SCHEDULE RS - 2024

Alabama Department of Revenue Retirement Schedule

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PART III Spouse's Fully or Partially Taxable Retirement Distributions Е F G Н Distribution State IRA FEIN Code(s) **Account Number Gross Distribution** Code State ID Alabama Withheld Taxable to Alabama П 8 ALABAMA TAX WITHHELD from Spouse's Fully or Partially Taxable Retirement Distributions. Total lines 1-7, Column H and enter the amount here and Part 5, line 3... •10 RETIREMENT EXCLUSION. Is the spouse 65 or older and receives taxable retirement? • ☐ Yes • ☐ No If "Yes", each taxpayer is eligible up to \$6,000 not to exceed the Retirement Income Taxable to Alabama on line 9. If "No", you do not qualify for this exclusion. Stop and go to line 11. (See instructions for more information) •11 Spouse's Alabama Taxable Retirement Distribution. Subtract line 10 from line 9. Enter the amount here and on Part 4, line 2 PART IV Total Alabama Taxable Retirement Distribution 1 Primary's Alabama Taxable Retirement Distribution. Enter the amount from Part 2, line 11 • 2 Spouse's Alabama Taxable Retirement Distribution. Enter the amount from Part 3, line 11 • 3 Total Alabama Taxable Retirement Distribution. Add lines 1 and 2. Enter the amount here and on Form 40, Page 2, Part 1, Line 4 or Form 40NR, page 2, Part 1, Line 3, Column B PART V Alabama Tax Withheld Alabama tax withheld from Retirement Distribution(s) Exempt from Alabama Income. Enter the amount from Part 1, line 8 3 Spouse's Alabama tax withheld from a taxable retirement distribution. Enter the amount from Part 3, line 8 Total Alabama Tax Withheld from a 1099-R. Add lines 1, 2, and 3. Enter the amount here and include in the amount on Schedule W-2, line 17

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