

# **COMPLETING THE IOWA 1040A FORM**

## **Filing Deadline is April 30, 2009**

If...

- You are **married and have no children**
- You and your spouse worked only in Iowa during 2008, and
- You earned only wages and interest, and
- The amount in Box 1 of all your Form(s) W-2 combined is more than \$13,500....  
Then follow these instructions...

Log onto this site: <http://www.state.ia.us/government/drf/forms/0841080.pdf>

### **STEP 1:**

- Fill in your names, address, and Social Security Numbers in the spaces provided
- If you live in Ames, the County Number is 85 and the School District No. is 0225

### **STEP 2:**

- Put an X in the box beside “Married filing a joint return”

### **STEP 3:**

- Enter a “2” on Line a to the right of the triangle
- Enter “80” after the dollar sign on that line
- Also enter “80” on Line e.

### **STEP 4:**

- Add together the amount(s) from Box 1 of all your Form(s) W-2 and write that number on Line 1.
- Enter that same amount on Line 4.
- If you filed an Iowa tax return for 2007 and deducted Federal income tax (refer to Line 7 of your 2007 Iowa tax return), then received a refund of all or part of that tax from the U.S. government during 2008, enter the amount of your refund from the U.S. government on line 5. (This amount may have been reported to you on Form 1099-G.)
- Add Lines 4 and 5 and write the total on Line 6.
- Enter the amount(s) from Box 2 of your Form(s) W-2 after the triangle on Line 7a and on Line 7.

- Subtract the amount on Line 7 from the amount on Line 6 and write the total on Line 8.

**STEP 5:**

- Log on to this Website:  
<http://www.state.ia.us/government/drf/forms/1040AShortBooklet08.pdf> and scroll to the “2008 Tax Table” section on Page 1 (after the form)
- Find the amount in the “Other Statuses” column that corresponds to the amount written on Line 8 and enter that amount on Line 9.
- Enter “80” on Line 10.
- Subtract Line 10 from Line 9 and enter the result on Line 11.
- Multiply Line 11 by 5% and enter the result on Line 12. (The school district surtax for Ames is 5%. If you did not live in Ames on December 31, 2007, refer to this site: <http://www.state.ia.us/government/drf/forms/0741027.pdf>)
- If you wish to donate money to any of the projects shown in Lines 13 through 16, enter the amount of your donation on the appropriate line. Remember, these donations will reduce your refund or cause you to pay more.
- Add Lines 11 through 16 on Line 17.
- Add together the amount(s) from Box 17 of all your Form(s) W-2 and enter that total on Lines 18 and 20.

**STEP 6:**

- If Line 20 is larger than Line 17, subtract Line 17 from Line 20 and enter this amount on Line 21. This is your refund from the State of Iowa for 2008.
  - Enter a “0” on Line 22
  - Enter a “0” on Line 25
- If Line 20 is less than Line 17, subtract Line 20 from Line 17 and enter the result on Line 22 and on Line 25. This is the amount of additional tax you owe the State of Iowa for 2008.

## FINISHING UP:

- Leave the second page blank.
- Print a copy of your form.
- Sign on the line marked “Your Signature.” Your spouse must sign on the “Spouse’s Signature” line.
- Enter today’s date and your telephone number in the spaces provided.

## MAILING:

- **Make a photocopy of your signed form** and keep that copy for at least 3 years.
- Attach Copy 2 of your Form(s) W-2 to the bottom front of the form.
- If you have a **refund** due, mail your completed form in a regular envelope with a 42-cent stamp to:

Iowa Income Tax Refund Processing  
Hoover State Office Building  
Des Moines, Iowa 50319-0120

**NOTE:** It may take several months for a refund to be mailed to you at the address you provided in Step 1. Be sure to use an address where your refund check will reach you.

- If you **owe** additional tax for 2008
  - You may e-pay at [www.state.ia.us/tax](http://www.state.ia.us/tax) or write a check to Treasurer, State of Iowa
  - If you pay by check, write your social security number on the check and complete the Payment Voucher found here:  
<http://www.state.ia.us/government/drf/forms/0841137.pdf>
  - Attach your check and payment voucher to the front of the tax form
  - Mail your completed form in a regular envelope with a 42-cent stamp to:

Iowa Income Tax Processing  
P.O. Box 9187  
Des Moines, Iowa 50306-9187