DRAFT

MISSOURI DEPARTMENT OF REVENUE **2010 FORM MO-1040P**

MISSOURI INDIVIDUAL INCOME TAX RETURN AND PROPERTY TAX CREDIT CLAIM/ PENSION EXEMPTION—SHORT FORM

VENDOR CODE

MO-1040P 2D Test 2

SOCIAL SECURITY NUMBER	SPOUSE'S SOCIAL SECURITY NUMBER
222-55-8888	999-66-5858

NAME (LAST)	(FIRST)	M.I.	JR, SR
Petty	Warren	T	
SPOUSE'S (LAST)	(FIRST)	M.I.	JR, SR
Petty	Wynona	L	

☐ ☐ DECEASED IN 2010

IN CARE OF NAME (ATTORNEY, EXECUTOR, PERSONAL REP., ETC.)
Arthur Getty Atty

PRESENT ADDRESS (INCLUDE APARTMENT NO. OR RURAL ROUTE)
345 S Persnickety Pike

COUNTY OF RESIDENCE

CITY, TOWN, OR POST OFFICE	STATE	ZIP CODE
Nashville	TN	35788

PLEASE CHECK THE APPROPRIATE BOXES THAT APPLY TO YOURSELF OR YOUR SPOUSE AS OF DECEMBER 31, 2010.

AGE 62 THROUGH 64	AGE 65 OR OLDER	BLIND	100% DISABLED	NON-OBLIGATED SPOUSE
☐ YOURSELF	✔ YOURSELF	☐ YOURSELF	☐ YOURSELF	☐ YOURSELF
✔ SPOUSE	☐ SPOUSE	☐ SPOUSE	☐ SPOUSE	☐ SPOUSE

Enter the amount of your donation in the trust fund boxes to the right. See instructions for trust fund codes.

Children's Trust Fund | Veterans Trust Fund | Elderly Home Delivered Meals Trust Fund | Missouri National Guard Trust Fund | Workers' Memorial Trust Fund | Childhood Lead Testing Trust Fund | Missouri Military Family Relief Trust Fund | General Revenue Trust Fund | After School Retreat Trust Fund

INCOME

		Yourself	Spouse
1. **Federal Adjusted Gross Income** from your 2010 federal return (See worksheet on page 8.)	1	17,500 00	12,750 00
2. Any state income tax refund included in your 2010 federal adjusted income	2	– 125 00	– 125 00
3. Subtract Line 2 from Line 1. This is your Missouri adjusted gross income.	3	= 17,375 00	= 12,625 00
4. **TOTAL MISSOURI ADJUSTED GROSS INCOME** — Add both numbers on Line 3 and enter here.	4	30,000 00	
5. Income percentages — Divide Line 3 by Line 4 for both you and your spouse. (The total of the two must equal 100%. Round to the nearest whole number.)	5	58 %	42 %

DEDUCTIONS AND TAXABLE INCOME

6. Mark your filing status box below and enter the appropriate exemption amount on Line 6.

- ☐ A. Single — **$2,100 (See Box B before checking.)**
- ☐ B. Claimed as a dependent on another person's federal tax return — **$0.00**
- ✔ C. Married filing joint federal & combined Missouri — **$4,200**
- ☐ D. Married filing separate — **$2,100**
- ☐ E. Married filing separate (spouse NOT filing) — **$4,200**
- ☐ F. Head of household — **$3,500**
- ☐ G. Qualifying widow(er) with dependent child — **$3,500**

6 — 4,200 00

7. Tax from federal return (Do not enter amount from your Forms W-2 — **NOT** federal tax withheld.) 890 00 → Single—maximum of $5,000; Married filing combined—maximum of $10,000 — 7 + 890 00

CAUTION! See Page 6, Line 7.

8. Missouri standard or itemized deduction

Taxpayers Under Age 65
Single **$5,700**
Married Filing Combined **$11,400**
Married Filing Separate **$5,700**
Head of Household **$8,400**
Qualifying Widow(er) **$11,400**

Taxpayers Age 65 or Older
Single **$7,100**
Married Filing Combined and **YOU** are Age 65 or Older **$12,500**
Married Filing Combined and You and Your Spouse are **BOTH** Age 65 or Older **$13,600**
Married Filing Separate **$6,800**
Head of Household **$9,800**
Qualifying Widow(er) **$12,500**

If blind, claimed as a dependent, or if you claimed an additional standard deduction on your federal return, see your federal return, page 6 and 7 of the instructions, or page 4 of the Form MO-1040P. If itemizing, see page 4 of the Form MO-1040P. — 8 + 12,500 00

If 65 or older and/or blind the appropriate boxes must be checked above.

9. Number of dependents from Federal Form 1040 OR 1040A, Line 6c **(DO NOT INCLUDE YOURSELF OR SPOUSE.)** ☐ x $1,200 — 9 + 00

Do not include yourself or your spouse.

10. Pension exemption (Complete worksheet on page 3 of Form MO-1040P.) **Attach worksheet on page 3, a copy of federal return, Forms W-2P, and/or Forms 1099-R.** — 10 + 6,900 00

11. Long-term care insurance deduction — 11 + 1,200 00

12. **TOTAL DEDUCTIONS** — Add Lines 6 through 11. — 12 = 25,690 00

13. **Missouri Taxable Income** — Subtract Line 12 (Total Deductions) from Line 4 (Total Missouri Income) and enter here. — 13 4,310 00

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For Privacy Notice, see instructions.

TAXES

14. Total Missouri taxable amount from Line 13	14		00
15. Multiply Line 14 by the percentages you determined on Line 5. Do this for you and your spouse.	15	Yourself: 2,500 00	Spouse: 1,810 00
16. Use the tax table on page 4 of Form MO-1040P to figure the tax on amounts from Line 15 for you and your spouse.	16	Yourself: 49 00	Spouse: 32 00
17. **TOTAL TAXES** — Add your tax and your spouse's tax from Line 16.	17	81	00

PAYMENTS/CREDITS

18. Missouri withholding for you and your spouse from your Forms W-2 and 1099. **Attach copies of Forms W-2 and 1099.**	18	488	00
19. Any Missouri estimated tax payments for 2010 (Be sure to include any amount of your 2009 overpayment credited to your 2010 Missouri tax return.)	19		00
20. **PROPERTY TAX CREDIT** — Enter amount from Form MO-PTS, Line 14. **Attach Form MO-PTS.** CAUTION! **Attach Form MO-PTS.**	20		00
21. **TOTAL PAYMENTS AND CREDITS** Add Lines 18, 19, and 20 and enter amount here.	21	488	00

REFUND

22. If amount of **TOTAL PAYMENTS AND CREDITS** (Line 21) is larger than amount of **TOTAL TAXES** (Line 17), enter the difference here. You have **overpaid**. If not, enter the amount on Line 26.	22	407	00
23. Enter the amount from Line 22 you want applied to **your 2011 estimated tax**.	23		00

24. Enter the amount of your donation in the trust fund boxes to the right. See instructions for trust fund codes.

Children's Trust Fund	Veterans Trust Fund	Elderly Home Delivered Meals Trust Fund	Missouri National Guard Trust Fund	Workers' Memorial Trust Fund	Childhood Lead Testing Trust Fund	Missouri Military Family Relief Trust Fund	General Revenue Trust Fund	After School Retreat Trust Fund	Addl. Trust Fund Code (See Instr.)	Addl. Trust Fund Code (See Instr.)
24 00	00	00	00	00	00	00	00	00	00	00

25. Subtract Lines 23 and 24 from Line 22 and enter here. This is your refund. **Sign below and mail to: Department of Revenue, P.O. Box 2800, Jefferson City, MO 65105-2800.** **REFUND**	25	407	00

If you would like your refund deposited directly to your checking or savings account, complete boxes a, b, and c below.

a. Routing Number ☐☐☐☐☐☐☐☐☐ b. Account Number ☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐☐ c. ☐ Checking ☐ Savings

AMOUNT DUE

26. If Line 21 is less than Line 17, enter the difference here. You have an amount due. **Sign below and mail to: Department of Revenue, P.O. Box 3395, Jefferson City, MO 65105-3395.** **AMOUNT YOU OWE**	26		00

If you pay by check, you authorize the Department of Revenue to process the check electronically. Any check returned unpaid may be presented again electronically.

SIGNATURE

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which he/she has any knowledge. As provided in Chapter 143, RSMo, a penalty of up to $500 shall be imposed on any individual who files a frivolous return. I also declare under penalties of perjury that I employ no illegal or unauthorized aliens as defined under federal law and that I am not eligible for any tax exemption, credit or abatement if I employ such aliens.

I authorize the Director of Revenue or delegate to discuss my return and attachments with the preparer or any member of the preparer's firm. ☒ YES ☐ NO	E-MAIL ADDRESS	PREPARER'S PHONE NUMBER ( )

SIGNATURE	DATE	PREPARER'S SIGNATURE	FEIN, SSN, OR PTIN
X			431258888
SPOUSE'S SIGNATURE (If filing combined both must sign)	DAYTIME TELEPHONE (915) 458-7788	PREPARER'S ADDRESS AND ZIP CODE	DATE

PUBLIC PENSION CALCULATION — Pensions received from any federal, state, or local government.

SECTION A

1. Missouri adjusted gross income from Form MO-1040P, Line 4	1				30,000	00
2. **Taxable** social security benefits from federal Form 1040A, Line 14b or federal Form 1040, Line 20b	2					00
3. Subtract Line 2 from Line 1	3				30,000	00
4. Select the appropriate filing status and enter amount on Line 4. Married filing combined - $100,000; Single, Head of Household, Married Filing Separate, and Qualifying Widow - $85,000	4				100,000	00
5. Subtract Line 4 from Line 3 and enter on Line 5. If Line 4 is greater than Line 3, enter $0	5				0	00
		Y - YOURSELF		S - SPOUSE		
6. **Taxable** pension for each spouse from public sources from federal Form 1040A, Line 12b or 1040, Line 16b	6Y		00	6S		00
7. Multiply Line 6 by 65%	7Y		00	7S		00
8. Amount from Line 7 or $33,703 (maximum social security benefit), whichever is less.	8Y		00	8S		00
9. Amount from Line 6 or $6,000, whichever is less	9Y		00	9S		00
10. Amount from Line 8 or Line 9, whichever is greater	10Y		00	10S		00
11. If you received taxable social security complete Lines 1 through 8 of Section C and enter the amount(s) from Line(s) 6y and 6s. See instructions if Line 3 of Section C is more than $0.	11Y		00	11S		00
12. Subtract Line 11 from Line 10. If Line 11 is greater than Line 10, enter $0	12Y		00	12S		00
13. Add amounts on Lines 12y and 12s	13					00
14. **Total public pension**, subtract Line 5, from Line 13. If Line 5 is greater than Line 13, enter $0	14					00

PRIVATE PENSION CALCULATION — Annuities, pensions, IRA'S, and 401(k) plans funded by a private source.

SECTION B

1. Missouri adjusted gross income from Form MO-1040P, Line 4	1				30,000	00
2. **Taxable** social security benefits from federal Form 1040A, Line 14b or federal Form 1040, Line 20b	2					00
3. Subtract Line 2 from Line 1.	3				30,000	00
4. Select the appropriate filing status and enter the amount on Line 4: Married filing combined: $32,000; Single, Head of Household and Qualifying Widower: $25,000; Married Filing Separate: $16,000	4				32,000	00
5. Subtract Line 4 from Line 3. If Line 4 is greater than Line 3, enter $0	5					00
		Y - YOURSELF		S - SPOUSE		
6. **Taxable** pension for each spouse from **private sources** from federal Form 1040A, Lines 11b and 12b, or federal Form 1040, Lines 15b and 16b.	6Y	4,800	00	6S	2,100	00
7. Amounts from Line 6Y and 6S or $6,000, whichever is less	7Y	4,800	00	7S	2,100	00
8. Add Lines 7Y and 7S	8				6,900	00
9. **Total private pension**, subtract Line 5 from Line 8. If Line 5 is greater than Line 8, enter $0	9				6,900	00

SOCIAL SECURITY OR SOCIAL SECURITY DISABILITY CALCULATION — To be eligible for social security deduction you must be 62 years of age by December 31 and have marked the 62 and older box on page 1 of Form MO-1040P. Age limit does not apply to social security disability deduction.

SECTION C

1. Missouri adjusted gross income from Form MO-1040P, Line 4	1				30,000	00
2. Select the appropriate filing status and enter the amount on Line 2. Married filing combined - $100,000 Single, Head of Household, Married Filing Separate, and Qualifying Widower - $85,000	2				100,000	00
3. Subtract Line 2 from Line 1 and enter on Line 3. If Line 2 is greater than Line 1, enter $0	3					00
		Y - YOURSELF		S - SPOUSE		
4. **Taxable** social security benefits for each spouse from federal Form 1040A, Line 14b or federal Form 1040, Line 20b	4Y		00	4S		00
5. **Taxable** social security **disability** benefits for each spouse from federal Form 1040A, Line 14b or 1040, Line 20b.	5Y		00	5S		00
6. Multiply Line 4 or Line 5 by 65%.	6Y		00	6S		00
7. Add Lines 6Y and 6S	7					00
8. **Total social security/social security disability**, subtract Line 3 from Line 7. If Line 3 is greater than Line 7, enter $0.	8					00

MILITARY PENSION CALCULATION

SECTION D

1. Military retirement benefits included on federal Form 1040A, Line 12b or federal Form 1040, Line 16b	1	47500	00
2. Taxable **public pension** from federal Form 1040A, Line 12b or federal Form 1040, Line 16b.	2	27500	00
3. Divide Line 1 by Line 2	3	63	%
4. Multiply Line 3 by Line 14 of Section A. If you are not claiming a public pension exemption, enter $0	4	0	00
5. Subtract Line 4 from Line 1	5	47500	00
6. **Total military pension**, multiply Line 5 by 15%.	6	7125	00

TOTAL PENSION AND SOCIAL SECURITY/SOCIAL SECURITY DISABILITY EXEMPTION

SECTION E

Add Line 14 (Section A), Line 9 (Section B), Line 8 (Section C), and Line 6 (Section D). **Enter total amount here and on Form MO-1040P, Line 10.**	TOTAL EXEMPTION	6,900	00

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