



MISSOURI DEPARTMENT OF REVENUE 2009 FORM MO-1040 INDIVIDUAL INCOME TAX RETURN—LONG FORM

FOR CALENDAR YEAR JAN. 1—DEC. 31, 2009, OR FISCAL YEAR BEGINNING 2009, ENDING 20

AMENDED RETURN — CHECK HERE SOFTWARE VENDOR CODE

NAME AND ADDRESS SOCIAL SECURITY NUMBER SPOUSE'S SOCIAL SECURITY NUMBER

NAME (LAST) (FIRST) M.I. JR, SR JACKSON Doug L DECEASED IN 2009 SPOUSE'S (LAST) (FIRST) M.I. JR, SR JACKSON Diane J

IN CARE OF NAME (ATTORNEY, EXECUTOR, PERSONAL REPRESENTATIVE, ETC.) COUNTY OF RESIDENCE SCHOOL DISTRICT NO. Cole 224

PRESENT ADDRESS (INCLUDE APARTMENT NUMBER OR RURAL ROUTE) CITY, TOWN, OR POST OFFICE STATE ZIP CODE 625 Pine Trail Jefferson City MO 65101

You may contribute to any one or all of the trust funds on Line 45. See pages 9–10 for a description of each trust fund, as well as trust fund codes to enter on Line 45. Children's Veterans Elderly Home Delivered Meals Missouri National Guard Workers' Memorial LEAD Childhood Lead Testing Missouri Military Family Relief General Revenue After School Retreat

PLEASE CHECK THE APPROPRIATE BOXES THAT APPLY TO YOURSELF OR YOUR SPOUSE AS OF DECEMBER 31, 2009.

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

Table with 7 rows and 4 columns (1Y, 2Y, 3Y, 4Y, 5Y, 6, 7Y) for INCOME. Includes rows for Federal adjusted gross income, total additions, total income, total subtractions, Missouri adjusted gross income, total Missouri adjusted gross income, and income percentages.

Table with 23 rows and 4 columns (8, 9, 10, 11, 12, 13, 14, 15, 16, 17, 18, 19, 20, 21Y, 22Y, 23Y) for EXEMPTIONS AND DEDUCTIONS. Includes rows for Pension and Social Security exemption, filing status, tax from federal return, federal tax deduction, Missouri standard deduction, dependents, and various other deductions.

1040 2D Test 4

	Yourself		Spouse	
24. Taxable income amount from Lines 23Y and 23S	24Y	4,881 00	24S	18,362 00
25. Tax. (See tax table on page 38 of the instructions.)	25Y	120 00	25S	877 00
26. Resident credit — <b>Attach Form MO-CR and other states' income tax return(s). OR</b>	26Y	0 00	26S	0 00
27. Missouri income percentage — Enter 100% unless you are completing Form MO-NRI. <b>Attach Form MO-NRI and a copy of your federal return if less than 100%.</b> Check the box if you or your spouse is a professional entertainer or a member of a professional athletic team. <input type="checkbox"/> YOURSELF <input type="checkbox"/> SPOUSE	27Y	100 %	27S	100 %
28. Balance — Subtract Line 26 from Line 25; OR Multiply Line 25 by percentage on Line 27.	28Y	120 00	28S	877 00
29. Other taxes (Check box and attach federal form indicated.) <input type="checkbox"/> Lump sum distribution (Form 4972) <input type="checkbox"/> Recapture of low income housing credit (Form 8611)	29Y	0 00	29S	0 00
30. Subtotal — Add Lines 28 and 29.	30Y	120 00	30S	877 00
31. Total Tax — Add Lines 30Y and 30S.	31		997	00

32. MISSOURI tax withheld — <b>Attach Form W-2(s) and/or Form 1099(s).</b>	32	963 00
33. 2009 Missouri estimated tax payments (include overpayment from 2008 applied to 2009)	33	677 00
34. Missouri tax payments for nonresident partners or S corporation shareholders — <b>Attach Form MO-2NR.</b>	34	0 00
35. Missouri tax payments for nonresident entertainers — <b>Attach Form MO-2ENT.</b>	35	0 00
36. Amount paid with Missouri extension of time to file (Form MO-60)	36	0 00
37. Miscellaneous tax credits (from Form MO-TC, Line 13) — <b>Attach Form MO-TC.</b>	37	0 00
38. Property tax credit — <b>Attach Form MO-PTS.</b>	38	00
39. Total payments and credits — Add Lines 32 through 38.	39	1,640 00

**Skip Lines 40–42 if you are not filing an amended return.**

40. Amount paid on original return	40	00
41. Overpayment as shown (or adjusted) on original return	41	00
INDICATE REASON(S) FOR AMENDING.		
<input type="checkbox"/> A. Federal audit . . . . . Enter date of IRS report.		
<input type="checkbox"/> B. Net operating loss carryback . . . . . Enter year of loss.		
<input type="checkbox"/> C. Investment tax credit carryback . . . . . Enter year of credit.		
<input type="checkbox"/> D. Correction other than A, B, or C . . . . . Enter date of federal amended return, if filed.		
42. Amended Return — total payments and credits. Add Line 40 to Line 39 or subtract Line 41 from Line 39.	42	00

43. If Line 39, or if amended return, Line 42, is larger than Line 31, enter difference (amount of <b>OVERPAYMENT</b> ) here.	43	643 00
44. Amount of Line 43 to be applied to your 2010 estimated tax	44	0 00
45. Enter the amount of your donation in the trust fund boxes to the right. See instructions for trust fund codes.	45	10 00
46. Overpayment to be refunded to you. Subtract Lines 44 and 45 from Line 43 and enter here. <b>Sign below</b> and mail return to: <b>Department of Revenue, PO BOX 3222, JEFFERSON CITY, MO 65105-3222</b>	46	623 00
47. If Line 31 is larger than Line 39 or Line 42, enter the difference (amount of <b>UNDERPAYMENT</b> ) here.	47	0 00
48. Underpayment of estimated tax penalty — <b>Attach Form MO-2210.</b> Enter penalty amount here.	48	0 00
49. Total amount due — Add Lines 47 and 48 and enter here. <b>Sign below</b> and mail return and payment to: <b>Department of Revenue, PO BOX 3370, JEFFERSON CITY, MO 65105-3370.</b> Please write your social security number(s) and daytime phone number on your check or money order (U.S. funds only).  Make payable to Missouri Department of Revenue.	49	0 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.

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. <input type="checkbox"/> YES <input type="checkbox"/> NO		E-MAIL ADDRESS	PREPARER'S TELEPHONE
SIGNATURE	DATE	PREPARER'S SIGNATURE	FEIN, SSN, OR PTIN
SPOUSE'S SIGNATURE (If filing combined, BOTH must sign)	DAYTIME TELEPHONE	PREPARER'S ADDRESS AND ZIP CODE	DATE

DRAFT



MISSOURI DEPARTMENT OF REVENUE  
INCREASE TO STANDARD DEDUCTION  
FOR CERTAIN FILERS

2009  
FORM  
MO-L

1040 2D Test 4

You must complete this form if you are increasing your standard deduction by a net disaster loss, state or local real estate taxes, or new motor vehicle taxes. Be sure to attach your federal return and federal Schedule L when you file.

YOUR NAME Doug L Jackson		YOUR SOCIAL SECURITY NO. 4   0   0   0   0   6   1   1   6	
SPOUSE'S NAME Diane J Jackson		SPOUSE'S SOCIAL SECURITY NO. 4   0   0   0   0   6   1   1   7	
1. Enter the standard deduction for your filing status: • Single or Married Filing Separately - <b>\$5,700</b> • Married Filing Combined or Qualifying Widow(er) - <b>\$11,400</b> • Head of Household - <b>\$8,350</b> • Claimed as a dependent - enter amount from Line 4 of federal Schedule L. . . .	1.	11,400	00
2. If you are over 65 or blind, enter the amount reported on Line 5 of federal Schedule L . . . . .	2.	1,100	00
3. Enter the amount of any net disaster loss included in your standard deduction and reported on Line 1 of federal Schedule L . . . . .	3.	0	00
4. Enter the amount of state and local real estate taxes included in your standard deduction and reported on Line 9 of federal Schedule L. . . . .	4.	780	00
5. Enter the amount of any new motor vehicle taxes included in your standard deduction and reported on Line 20 of federal Schedule L. . . . .	5.	0	00
6. Add the amounts shown on Lines 1 through 5 and report the total here and on Form MO-1040 Line 14, Form MO-1040A Line 6, or Form MO-1040P Line 8. . .	6.	13280	00

MO-L (11-2009)



MISSOURI DEPARTMENT OF REVENUE  
INCREASE TO STANDARD DEDUCTION  
FOR CERTAIN FILERS

2009  
FORM  
MO-L

You must complete this form if you are increasing your standard deduction by a net disaster loss, state or local real estate taxes, or new motor vehicle taxes. Be sure to attach your federal return and federal Schedule L when you file.

YOUR NAME		YOUR SOCIAL SECURITY NO.	
SPOUSE'S NAME		SPOUSE'S SOCIAL SECURITY NO.	
1. Enter the standard deduction for your filing status: • Single or Married Filing Separately - <b>\$5,700</b> • Married Filing Combined or Qualifying Widow(er) - <b>\$11,400</b> • Head of Household - <b>\$8,350</b> • Claimed as a dependent - enter amount from Line 4 of federal Schedule L. . . .	1.		00
2. If you are over 65 or blind, enter the amount reported on Line 5 of federal Schedule L . . . . .	2.		00
3. Enter the amount of any net disaster loss included in your standard deduction and reported on Line 1 of federal Schedule L . . . . .	3.		00
4. Enter the amount of state and local real estate taxes included in your standard deduction and reported on Line 9 of federal Schedule L. . . . .	4.		00
5. Enter the amount of any new motor vehicle taxes included in your standard deduction and reported on Line 20 of federal Schedule L. . . . .	5.		00
6. Add the amounts shown on Lines 1 through 5 and report the total here and on Form MO-1040 Line 14, Form MO-1040A Line 6, or Form MO-1040P Line 8. . .	6.		00

MO-L (11-2009)

IF YOU CLAIM A PENSION OR SOCIAL SECURITY/SOCIAL SECURITY DISABILITY EXEMPTION, YOU MUST ATTACH A COPY OF YOUR FEDERAL RETURN (PAGES 1 AND 2) AND 1099-R(S), AND/OR SSA-1099(S).

PART 3

**PUBLIC PENSION CALCULATION — Public pensions are pensions received from any federal, state, or local government.**

1. Enter your Missouri Adjusted Gross Income from Form MO-1040, Line 6 . . . . .	1		58,643	00		
2. Enter your taxable social security benefits from federal Form 1040A, Line 14b or federal Form 1040, Line 20b . . . . .	2		14,097	00		
3. Subtract line 2 from line 1 . . . . .	3		44,546	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		100000	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		
		<b>Y - YOURSELF</b>		<b>S - SPOUSE</b>		
6. Enter taxable pension for each spouse from public sources from federal Form 1040A, Line 12b or federal Form 1040, Line 16b (public pensions and pensions from other than private sources) . . . . .	6Y		00	6S	16,923	00
7. Multiply Line 6 by 50% . . . . .	7Y	0	00	7S	8,462	00
8. If amount on Line 7 is greater than \$33,703 (maximum social security benefit) enter \$33,703. If amount on Line 7 is less than \$33,703, enter amount from Line 7 . . . . .	8Y	0	00	8S	8,462	00
9. Enter the amount from Line 6 or \$6,000, whichever is less . . . . .	9Y	0	00	9S	6,000	00
10. Enter the amount from Line 8 or Line 9, whichever is greater . . . . .	10Y	0	00	10S	8,462	00
11. If you received taxable social security and are claiming a social security exemption, complete Lines 1 through 8 of the 3rd section of Part 3 of the MO-A (social security or social security disability exemption) and enter the amount(s) from Line(s) 6y and 6s here . . . . .	11Y		00	11S	2,467	00
12. Subtract Line 11 from Line 10. If line 11 is greater than Line 10, enter \$0 . . . . .	12Y		00	12S	5,995	00
13. Add amounts on Lines 12y and 12s . . . . .	13				5,995	00
14. Total Public Pension, subtract Line 5, from Line 13. If Line 5 is greater than Line 13, enter \$0 . . . . .	14				5,995	00

**PRIVATE PENSION CALCULATION — Private pensions are annuities, pensions, 401(K) plans, deferred compensation plans, self-employed retirement plans, and IRA's funded by a private source.**

1. Enter your Missouri Adjusted Gross Income from Form MO-1040, Line 6 . . . . .	1				00	
2. Enter your <b>taxable</b> 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				0 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				00	
5. Subtract Line 4 from Line 3. If Line 4 is greater than Line 3, enter \$0 . . . . .	5				0 00	
		<b>Y - YOURSELF</b>		<b>S - SPOUSE</b>		
6. Enter <b>taxable</b> pension for each spouse from <b>private sources</b> from federal Form 1040A, Lines 11b and 12b, or federal Form 1040, Lines 15b and 16b. . . . .	6Y		00	6S		00
7. Enter the amounts from Line 6Y and 6S or \$6,000, whichever is less . . . . .	7Y		00	7S		00
8. Add Lines 7Y and 7S . . . . .	8				0	00
9. <b>Total private pension</b> , subtract Line 5 from Line 8. If Line 5 is greater than Line 8, enter \$0 . . . . .	9				0	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-1040. Age limit does not apply to social security disability deduction.**

1. Enter your Missouri Adjusted Gross Income from Form MO-1040, Line 6 . . . . .	1		58,643		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		100000		00	
3. Subtract Line 2 from Line 1 and enter on Line 3. If Line 2 is greater than Line 1, enter \$0 . . . . .	3		0		00	
		<b>Y - YOURSELF</b>		<b>S - SPOUSE</b>		
4. Enter <b>taxable</b> social security benefits for each spouse from federal Form 1040A, Line 14b or federal Form 1040, Line 20b . . . . .	4Y		00	4S	4,934	00
5. Enter <b>taxable</b> social security disability benefits for each spouse from federal Form 1040A, Line 14b or federal Form 1040, Line 20b . . . . .	5Y	9,163	00	5S		00
6. Multiply Line 4 or Line 5 by 50%. . . . .	6Y	4,582	00	6S	2,467	00
7. Add Lines 6Y and 6S . . . . .	7				7,049	00
8. <b>Total social security/social security disability</b> , subtract Line 3 from Line 7. If Line 3 is greater than Line 7, enter \$0 . . . . .	8				7,049	00

**TOTAL PENSION AND SOCIAL SECURITY / SOCIAL SECURITY DISABILITY EXEMPTION**

Total Pension Exemption and Social Security / Social Security Disability Exemption. Add Line 14 (Public Pension Calculation), Line 9 (Private Pension Calculation), and Line 8 (Social Security Calculation) and enter here and on Form MO-1040, Line 8. . . . .		<b>TOTAL EXEMPTION</b>			13,044	00
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