

MISSOURI DEPARTMENT OF REVENUE **2009 FORM MO-1040P**
MISSOURI INDIVIDUAL INCOME TAX RETURN AND
PROPERTY TAX CREDIT CLAIM/
PENSION EXEMPTION—SHORT FORM VENDOR CODE **002**

1040P 2D Test 2

SOCIAL SECURITY NUMBER 222-55-8888		SPOUSE'S SOCIAL SECURITY NUMBER 999-66-5858	
NAME (LAST) Petty	(FIRST) Warren	M.I. JR, SR T	DECEASED IN 2009 <input type="checkbox"/>
SPOUSE'S (LAST) Petty	(FIRST) Wynona	M.I. JR, SR L	
IN CARE OF NAME (ATTORNEY, EXECUTOR, PERSONAL REP., ETC.) Arthur Getty Atty			
PRESENT ADDRESS (INCLUDE APARTMENT NO. OR RURAL ROUTE) 345 S Persnickety Pike		APT. NUMBER	COUNTY OF RESIDENCE
CITY, TOWN, OR POST OFFICE Nashville		STATE TN	ZIP CODE 35788
SCHOOL DISTRICT NO. 347			
PLEASE CHECK THE APPROPRIATE BOXES THAT APPLY TO YOURSELF OR YOUR SPOUSE.			
AGE 62 THROUGH 64 <input type="checkbox"/> YOURSELF <input checked="" type="checkbox"/> SPOUSE			
AGE 65 OR OLDER <input checked="" type="checkbox"/> YOURSELF <input type="checkbox"/> SPOUSE			
BLIND <input type="checkbox"/> YOURSELF <input type="checkbox"/> SPOUSE			
100% DISABLED <input type="checkbox"/> YOURSELF <input type="checkbox"/> SPOUSE			
NON-OBLIGATED SPOUSE <input type="checkbox"/> YOURSELF <input type="checkbox"/> SPOUSE			

You may contribute to any one or all of the trust funds that are listed to the right. Place the total amount contributed on Line 24. See the instructions for a list of Trust Fund Codes.

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

INCOME	Yourself		Spouse	
1. Federal Adjusted Gross Income from your 2009 federal return (See worksheet on page 8.)	1	17,500 00	12,750 00	00
2. Any state income tax refund included in your 2009 federal income	2	- 125 00	- 125 00	00
3. Subtract Line 2 from Line 1. This is your Missouri adjusted gross income.	3	= 17,375 00	= 12,625 00	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 %	
6. Mark your filing status box below and enter the appropriate exemption amount on Line 6.	6		4,200 00	00
<input type="checkbox"/> A. Single — \$2,100 (See Box B before checking.) <input type="checkbox"/> B. Claimed as a dependent on another person's federal tax return — \$0.00 <input checked="" type="checkbox"/> C. Married filing joint federal & combined Missouri — \$4,200 <input type="checkbox"/> D. Married filing separate — \$2,100 <input type="checkbox"/> E. Married filing separate (spouse NOT filing) — \$4,200 <input type="checkbox"/> F. Head of household — \$3,500 <input type="checkbox"/> G. Qualifying widow(er) with dependent child — \$3,500				
7. Tax from federal return (Do not enter amount from your Form W-2(s) — NOT federal tax withheld.)	7	890 00	890 00	00
8. Missouri standard or itemized deduction	8		12,500 00	00
Taxpayers Under Age 65 Single \$5,700 Married Filing Combined \$11,400 Married Filing Separate \$5,700 Head of Household \$8,350 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 \$9,750 Qualifying Widow(er) \$12,500				
9. Number of dependents from Federal Form 1040 OR 1040A, Line 6c (DO NOT INCLUDE YOURSELF OR SPOUSE.)	9			00
10. Pension exemption (Complete worksheet on page 3 of Form MO-1040P.) Attach worksheet on page 3, a copy of federal return, Form W-2P(s), and/or Form 1099-R(s).	10		6,900 00	00
11. Long-term care insurance deduction	11		1,200 00	00
12. TOTAL DEDUCTIONS — Add Lines 6 through 11.	12		25,690 00	00
13. Missouri Taxable Income — Subtract Line 12 (Total Deductions) from Line 4 (Total Missouri Income) and enter here.	13		4,310 00	00

CAUTION!

See Page 6, Line 7.

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

Do not include yourself or your spouse.

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.		Yourself		Spouse							
			15	2,500	00	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	49	00	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(s) and 1099(s). Attach copies of Forms W-2(s) and 1099(s).		18	488	00							
	19. Any Missouri estimated tax payments for 2009 (Be sure to include any amount of your 2008 overpayment credited to your 2009 Missouri tax return.)		19	00								
	20. PROPERTY TAX CREDIT — Enter amount from Form MO-PTS, Line 14. Attach Form MO-PTS.		20	00								
	21. TOTAL PAYMENTS AND CREDITS Add Lines 18, 19, and 20 and enter amount here.		21	488	00							
PAYMENTS/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 next year's taxes		23	00								
	24. You may donate part of your refund or contribute additional payments to any or all of the trust funds listed to the right. Please indicate your choices and the amount of your donations for each fund in the appropriate boxes.		24	00	00	00	00	00	00	00	00	00
MAIL TO	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 3385, Jefferson City, MO 65105-3385. REFUND		25	407	00							
	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 3385, Jefferson City, MO 65105-3385. AMOUNT DUE		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. <input checked="" type="checkbox"/> YES <input type="checkbox"/> NO		E-MAIL ADDRESS		PREPARER'S PHONE NUMBER							
	SIGNATURE		DATE		PREPARER'S SIGNATURE							
	DATE		PREPARER'S SIGNATURE		FEIN, SSN, OR PTIN							
SPOUSE'S SIGNATURE		DAYTIME TELEPHONE		PREPARER'S ADDRESS AND ZIP CODE								
DATE		DATE		DATE								

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).

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

SECTION A	1. Enter your Missouri Adjusted Gross Income from Form MO-1040P, Line 4	1	30,000	00			
	2. Enter your 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. 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		00
	7. Multiply Line 6 by 50%	7Y		00	7S		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		00	8S		00
	9. Enter the amount from Line 6 or \$6,000, whichever is less	9Y		00	9S		00
	10. Enter the amount from Line 8 or Line 9, whichever is greater	10Y		00	10S		00
	11. If you received taxable social security and are claiming a social security exemption, complete Lines 1 through 8 of Part 3 of the MO-A, Section C (social security or social security disability calculation) and enter the amount(s) from Line(s) 6y and 6s here. 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 — Private pensions are annuities, pensions, 401(K) plans, deferred compensation plans, self-employed retirement plans, and IRA's funded by a private source.

SECTION B	1. Enter your Missouri Adjusted Gross Income from Form MO-1040P, Line 4	1	30,000	00			
	2. Enter your 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. Enter 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. Enter the 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. Enter your 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. Enter taxable social security benefits for each spouse from federal Form 1040A, Line 14b or federal Form 1040, Line 20b	4Y		00	4S		00
	5. Enter taxable social security disability benefits for each spouse from federal Form 1040A, Line 14b or federal Form 1040, Line 20b	5Y		00	5S		00
	6. Multiply Line 4 or Line 5 by 50%	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	

TOTAL PENSION AND SOCIAL SECURITY / SOCIAL SECURITY DISABILITY EXEMPTION

Total Pension Exemption and Social Security / Social Security Disability Exemption. Add Line 14 (Section A), Line 9 (Section B), and Line 8 (Section C) and enter here and on Form MO-1040P, Line 10	TOTAL EXEMPTION	6,900	00
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MISSOURI ITEMIZED DEDUCTIONS

- Complete this section only if you itemized deductions on your federal return. (See information on page 6.)
- Attach a copy of your Federal Form 1040 (pages 1 and 2) and Federal Schedule A.

1. Total federal itemized deductions from Federal Form 1040, Line 40a	1		00
2. 2009 (FICA) — yourself — Social security \$ _____ + Medicare \$ _____	2		00
3. 2009 (FICA) — spouse — Social security \$ _____ + Medicare \$ _____	3		00
4. 2009 Railroad retirement tax — yourself (Tier I and Tier II) \$ _____ + Medicare \$ _____ ..	4		00
5. 2009 Railroad retirement tax — spouse (Tier I and Tier II) \$ _____ + Medicare \$ _____ ..	5		00
6. 2009 Self-employment tax — Amount from Federal Form 1040, Line 27	6		00
7. TOTAL — Add Lines 1 through 6.	7		00
8. State and local income taxes — See instructions.	8		00
9. Earnings taxes included in Line 8 — See instructions.	9		00
10. Net state income taxes — Subtract Line 9 from Line 8.	10		00
11. MISSOURI ITEMIZED DEDUCTIONS — Subtract Line 10 from Line 7. Enter here and on Form MO-1040P, Line 8.	11		00

NOTE: IF LINE 11 IS LESS THAN YOUR FEDERAL STANDARD DEDUCTION, SEE INFORMATION ON PAGE 6.

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.

1. Enter the standard deduction for your filing status: • Single or Married Filing Separately - \$5,700 • Married Filing Combined or Qualifying Widow(er) - \$11,400 • Head of Household - \$8,350 • 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 6 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-1040P Line 8.	6		00

2009 TAX TABLE

If Line 15 is																	
At least	But less than	Your tax is	At least	But less than	Your tax is	At least	But less than	Your tax is	At least	But less than	Your tax is	At least	But less than	Your tax is	At least	But less than	Your tax is
0	100	\$ 0	1,500	1,600	\$ 26	3,000	3,100	\$ 62	4,500	4,600	\$109	6,000	6,100	\$167	7,500	7,600	\$238
100	200	2	1,600	1,700	28	3,100	3,200	65	4,600	4,700	113	6,100	6,200	172	7,600	7,700	243
200	300	4	1,700	1,800	30	3,200	3,300	68	4,700	4,800	116	6,200	6,300	176	7,700	7,800	248
300	400	5	1,800	1,900	32	3,300	3,400	71	4,800	4,900	120	6,300	6,400	181	7,800	7,900	253
400	500	7	1,900	2,000	34	3,400	3,500	74	4,900	5,000	123	6,400	6,500	185	7,900	8,000	258
500	600	8	2,000	2,100	36	3,500	3,600	77	5,000	5,100	127	6,500	6,600	190	8,000	8,100	263
600	700	10	2,100	2,200	39	3,600	3,700	80	5,100	5,200	131	6,600	6,700	194	8,100	8,200	268
700	800	11	2,200	2,300	41	3,700	3,800	83	5,200	5,300	135	6,700	6,800	199	8,200	8,300	274
800	900	13	2,300	2,400	44	3,800	3,900	86	5,300	5,400	139	6,800	6,900	203	8,300	8,400	279
900	1,000	14	2,400	2,500	46	3,900	4,000	89	5,400	5,500	143	6,900	7,000	208	8,400	8,500	285
1,000	1,100	16	2,500	2,600	49	4,000	4,100	92	5,500	5,600	147	7,000	7,100	213	8,500	8,600	290
1,100	1,200	18	2,600	2,700	51	4,100	4,200	95	5,600	5,700	151	7,100	7,200	218	8,600	8,700	296
1,200	1,300	20	2,700	2,800	54	4,200	4,300	99	5,700	5,800	155	7,200	7,300	223	8,700	8,800	301
1,300	1,400	22	2,800	2,900	56	4,300	4,400	102	5,800	5,900	159	7,300	7,400	228	8,800	8,900	307
1,400	1,500	24	2,900	3,000	59	4,400	4,500	106	5,900	6,000	163	7,400	7,500	233	8,900	9,000	312
															9,000		315

For assistance calculating your tax, go to www.dor.mo.gov/tax and select the Tax Calculator.

Tax on the first \$9,000 of taxable income is \$315. Tax on the income over \$9,000 is calculated at 6%. Example: If Line 15 of the Missouri return is \$12,000, then the Missouri tax is \$315 + \$180 (6% of \$3,000) = \$495.

PLUS 6% of excess over \$9,000

NOTE: Make sure **\$315** is included in your calculation of tax on taxable income over \$9,000.