

Label

(See instructions on page 14.)

Use the IRS label.

Otherwise, please print or type.

Form fields for personal information: Name, Social Security Number, Home address, City, etc.

Presidential Election Campaign

Check here if you, or your spouse if filing jointly, want \$3 to go to this fund (see page 14)

Filing Status

- 1 Single, 2 Married filing jointly, 3 Married filing separately, 4 Head of household, 5 Qualifying widow(er)

Exemptions

6a Yourself, 6b Spouse, 6c Dependents table, 6d Total number of exemptions claimed

Income

7 Wages, salaries, tips, etc. 8a Taxable interest, 8b Tax-exempt interest, 9a Ordinary dividends, 9b Qualified dividends, 10 Taxable refunds, 11 Alimony received, 12 Business income, 13 Capital gain, 14 Other gains, 15a IRA distributions, 15b Taxable amount, 16a Pensions and annuities, 16b Taxable amount, 17 Rental real estate, 18 Farm income, 19 Unemployment compensation, 20a Social security benefits, 20b Taxable amount, 21 Other income, 22 Total income

Adjusted Gross Income

23 Educator expenses, 24 Business expenses, 25 Health savings account, 26 Moving expenses, 27 Self-employment tax, 28 Self-employed SEP, SIMPLE, 29 Self-employed health insurance, 30 Penalty on early withdrawal, 31a Alimony paid, 31b Recipient's SSN, 32 IRA deduction, 33 Student loan interest, 34 Tuition and fees, 35 Domestic production activities, 36 Total adjustments, 37 Adjusted gross income

Tax and Credits

38 Amount from line 37 (adjusted gross income) **38**

39a Check **You** were born before January 2, 1945, **Blind.** } **Total boxes**
if: **Spouse** was born before January 2, 1945, **Blind.** } **checked** ▶ **39a**

b If your spouse itemizes on a separate return or you were a dual-status alien, see page 35 and check here ▶ **39b**

40a **Itemized deductions** (from Schedule A) or your **standard deduction** (see left margin) **40a**

b If you are increasing your standard deduction by certain real estate taxes, new motor vehicle taxes, or a net disaster loss, attach Schedule L and check here (see page 35) . ▶ **40b**

41 Subtract line 40a from line 38 **41**

42 **Exemptions.** If line 38 is \$125,100 or less and you did not provide housing to a Midwestern displaced individual, multiply \$3,650 by the number on line 6d. Otherwise, see page 37 **42**

43 **Taxable income.** Subtract line 42 from line 41. If line 42 is more than line 41, enter -0- **43**

44 **Tax** (see page 37). Check if any tax is from: **a** Form(s) 8814 **b** Form 4972 **44**

45 **Alternative minimum tax** (see page 40). Attach Form 6251 **45**

46 Add lines 44 and 45 ▶ **46**

47 Foreign tax credit. Attach Form 1116 if required **47**

48 Credit for child and dependent care expenses. Attach Form 2441 **48**

49 Education credits from Form 8863, line 29 **49**

50 Retirement savings contributions credit. Attach Form 8880 **50**

51 Child tax credit (see page 42) **51**

52 Credits from Form: **a** 8396 **b** 8839 **c** 5695 **52**

53 Other credits from Form: **a** 3800 **b** 8801 **c** **53**

54 Add lines 47 through 53. These are your **total credits** **54**

55 Subtract line 54 from line 46. If line 54 is more than line 46, enter -0- ▶ **55**

Other Taxes

56 Self-employment tax. Attach Schedule SE **56**

57 Unreported social security and Medicare tax from Form: **a** 4137 **b** 8919 **57**

58 Additional tax on IRAs, other qualified retirement plans, etc. Attach Form 5329 if required **58**

59 Additional taxes: **a** AEIC payments **b** Household employment taxes. Attach Schedule H **59**

60 Add lines 55 through 59. This is your **total tax** ▶ **60**

Payments

61 Federal income tax withheld from Forms W-2 and 1099 **61**

62 2009 estimated tax payments and amount applied from 2008 return **62**

63 Making work pay and government retiree credits. Attach Schedule M **63**

64a **Earned income credit (EIC)** **64a**

b Nontaxable combat pay election **64b**

65 Additional child tax credit. Attach Form 8812 **65**

66 Refundable education credit from Form 8863, line 16 **66**

67 First-time homebuyer credit. Attach Form 5405 **67**

68 Amount paid with request for extension to file (see page 62) **68**

69 Excess social security and tier 1 RRTA tax withheld (see page 62) **69**

70 Credits from Form: **a** 2439 **b** 4136 **c** 8801 **d** 8885 **70**

71 Add lines 61, 62, 63, 64a, and 65 through 70. These are your **total payments** ▶ **71**

Refund

72 If line 71 is more than line 60, subtract line 60 from line 71. This is the amount you **overpaid** **72**

73a Amount of line 72 you want **refunded to you**. If Form 8888 is attached, check here ▶ **73a**

▶ **b** Routing number ▶ **c** Type: Checking Savings

▶ **d** Account number

74 Amount of line 72 you want **applied to your 2010 estimated tax** ▶ **74**

Amount You Owe

75 **Amount you owe.** Subtract line 71 from line 60. For details on how to pay, see page 64 ▶ **75**

76 Estimated tax penalty (see page 64) **76**

Third Party Designee

Do you want to allow another person to discuss this return with the IRS (see page 65)? **Yes.** Complete the following. **No**

Designee's name ▶ Phone no. ▶ Personal identification number (PIN) ▶

Sign Here

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Joint return? See page 15. Keep a copy for your records. ▶

Your signature Date Your occupation Daytime phone number

Spouse's signature. If a joint return, **both** must sign. Date Spouse's occupation

Paid Preparer's Use Only

Preparer's signature ▶ Date Check if self-employed Preparer's SSN or PTIN

Firm's name (or yours if self-employed), address, and ZIP code ▶ EIN

Phone no.

Standard Deduction for—

- People who check any box on line 39a, 39b, or 40b or who can be claimed as a dependent, see page 35.
- All others:
 - Single or Married filing separately, \$5,700
 - Married filing jointly or Qualifying widow(er), \$11,400
 - Head of household, \$8,350

SCHEDULE M
(Form 1040A or 1040)

**Making Work Pay and Government
Retiree Credits**

OMB No. 1545-0074

2009

Attachment
Sequence No. **166**

Department of the Treasury
Internal Revenue Service (99)

▶ **Attach to Form 1040A, 1040, or 1040NR.**

▶ **See separate instructions.**

Name(s) shown on return

Your social security number

1a Important: See the instructions if you can be claimed as someone else's dependent, you have a net loss from a business, your wages include pay for work performed while an inmate in a penal institution, or you are filing Form 1040NR, 2555, or 2555-EZ. Residents of Puerto Rico or American Samoa, see Pub. 570.

Do you (and your spouse if filing jointly) have 2009 wages of more than \$6,451 (\$12,903 if married filing jointly)?

- Yes.** Skip lines 1a through 3. Enter \$400 (\$800 if married filing jointly) on line 4 and go to line 5.
- No.** Enter your earned income (see instructions) **1a**

b Nontaxable combat pay included on line 1a (see instructions) **1b**

2 Multiply line 1a by 6.2% (.062) **2**

3 Enter \$400 (\$800 if married filing jointly) **3**

4 Enter the **smaller** of line 2 or line 3 (unless you checked "Yes" on line 1a) **4**

5 Enter the amount from Form 1040, line 38*, or Form 1040A, line 22 **5**

6 Enter \$75,000 (\$150,000 if married filing jointly) **6**

- 7** Is the amount on line 5 more than the amount on line 6?
- No.** Skip line 8. Enter the amount from line 4 on line 9 below.
 - Yes.** Subtract line 6 from line 5 **7**

8 Multiply line 7 by 2% (.02) **8**

9 Subtract line 8 from line 4. If zero or less, enter -0- **9**

10 Did you (or your spouse, if filing jointly) receive an economic recovery payment in 2009? You may have received this payment if you received social security benefits, supplemental security income, railroad retirement benefits, or veterans disability compensation or pension benefits (see instructions).

- No.** Enter -0- on line 10 and go to line 11.
- Yes.** Enter the total of the payments received by you (and your spouse, if filing jointly). Do not enter more than \$250 (\$500 if married filing jointly) **10**

11 Did you (or your spouse, if filing jointly) receive a pension or annuity in 2009 for services performed as an employee of the U.S. Government or any U.S. state or local government from work **not** covered by social security? Do not include any pension or annuity reported on Form W-2.

- No.** Enter -0- on line 11 and go to line 12.
- Yes.**
 - If you checked "No" on line 10, enter \$250 (\$500 if married filing jointly and the answer on line 11 is "Yes" for both spouses)
 - If you checked "Yes" on line 10, enter -0- (exception: enter \$250 if filing jointly and the spouse who received the pension or annuity did not receive an economic recovery payment described on line 10)

12 Add lines 10 and 11 **12**

13 Subtract line 12 from line 9. If zero or less, enter -0- **13**

14 Making work pay and government retiree credits. Add lines 11 and 13. Enter the result here and on Form 1040, line 63; Form 1040A, line 40; or Form 1040NR, line 60 **14**

*If you are filing Form 2555, 2555-EZ, or 4563 or you are excluding income from Puerto Rico, see instructions.

**SCHEDULE A
(Form 1040)**

Itemized Deductions

OMB No. 1545-0074

2009

Attachment
Sequence No. **07**

Department of the Treasury
Internal Revenue Service (99)

▶ **Attach to Form 1040.**

▶ **See Instructions for Schedule A (Form 1040).**

Name(s) shown on Form 1040

Your social security number

Medical and Dental Expenses	Caution. Do not include expenses reimbursed or paid by others.			
	1 Medical and dental expenses (see page A-1)	1		
	2 Enter amount from Form 1040, line 38 2	2		
	3 Multiply line 2 by 7.5% (.075)	3		
4 Subtract line 3 from line 1. If line 3 is more than line 1, enter -0-			4	
Taxes You Paid <small>(See page A-2.)</small>	5 State and local (check only one box): a <input type="checkbox"/> Income taxes, or b <input type="checkbox"/> General sales taxes }	5		
	6 Real estate taxes (see page A-5)	6		
	7 New motor vehicle taxes from line 11 of the worksheet on back. Skip this line if you checked box 5b	7		
	8 Other taxes. List type and amount ▶ -----	8		
	9 Add lines 5 through 8			9
Interest You Paid <small>(See page A-5.)</small>	10 Home mortgage interest and points reported to you on Form 1098	10		
	11 Home mortgage interest not reported to you on Form 1098. If paid to the person from whom you bought the home, see page A-6 and show that person's name, identifying no., and address ▶ -----	11		
	Note. Personal interest is not deductible.			
	12 Points not reported to you on Form 1098. See page A-6 for special rules	12		
	13 Qualified mortgage insurance premiums (see page A-6)	13		
	14 Investment interest. Attach Form 4952 if required. (See page A-6.)	14		
15 Add lines 10 through 14			15	
Gifts to Charity <small>If you made a gift and got a benefit for it, see page A-7.</small>	16 Gifts by cash or check. If you made any gift of \$250 or more, see page A-7	16		
	17 Other than by cash or check. If any gift of \$250 or more, see page A-8. You must attach Form 8283 if over \$500	17		
	18 Carryover from prior year	18		
	19 Add lines 16 through 18			19
Casualty and Theft Losses	20 Casualty or theft loss(es). Attach Form 4684. (See page A-8.)			20
Job Expenses and Certain Miscellaneous Deductions <small>(See page A-9.)</small>	21 Unreimbursed employee expenses—job travel, union dues, job education, etc. Attach Form 2106 or 2106-EZ if required. (See page A-9.) ▶ -----	21		
	22 Tax preparation fees	22		
	23 Other expenses—investment, safe deposit box, etc. List type and amount ▶ -----	23		
	24 Add lines 21 through 23	24		
	25 Enter amount from Form 1040, line 38 25	25		
	26 Multiply line 25 by 2% (.02)	26		
27 Subtract line 26 from line 24. If line 26 is more than line 24, enter -0-			27	
Other Miscellaneous Deductions	28 Other—from list on page A-10. List type and amount ▶ -----			28
Total Itemized Deductions	29 Is Form 1040, line 38, over \$166,800 (over \$83,400 if married filing separately)? <input type="checkbox"/> No. Your deduction is not limited. Add the amounts in the far right column for lines 4 through 28. Also, enter this amount on Form 1040, line 40a. <input type="checkbox"/> Yes. Your deduction may be limited. See page A-10 for the amount to enter. } ▶			29
	30 If you elect to itemize deductions even though they are less than your standard deduction, check here ▶ <input type="checkbox"/>			