

FORM
40

2023

Alabama Individual Income Tax Return
RESIDENTS & PART-YEAR RESIDENTS

For the year Jan. 1 - Dec. 31, 2023, or other tax year: Beginning: Ending:

Your first name	Initial	Last name
•	•	•
Spouse's first name	Initial	Last name
•	•	•
Present home address (number and street or P.O. Box number)		
•		
City, town, or post office		State ZIP code
•		•
Check if address is outside U.S.		Foreign Country
• ☐		

Your social security number
•
☐ Check if primary is deceased Primary's deceased date (mm/dd/yyyy)
•
Spouse's social security number
•
☐ Check if spouse is deceased Spouse's deceased date (mm/dd/yyyy)
•

CHECK BOX IF AMENDED RETURN ☐Filing Status/
Exemptions

- 1 • ☐ \$1,500 Single 3 • ☐ \$1,500 Married filing separate. Complete Spouse SSN • ☐ NRA
- 2 • ☐ \$3,000 Married filing joint 4 • ☐ \$3,000 Head of Family (with qualifying person). Complete Schedule HOF.

Income
and
Adjustments

5a	Alabama Income Tax Withheld (from Schedule W-2, line 18, column G)	A - Alabama tax withheld	5b	Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J)	B - Income
•		5a •	00	•	00
6	Interest and dividend income (also attach Schedule B if over \$1,500)	6	•	•	00
7	Other income (from page 2, Part I, line 8)	7	•	•	00
8	Total income. Add amounts in the income column for line 5b through line 7	8	•	•	00
9	Total adjustments to income (from page 2, Part II, line 16)	9	•	•	00
10	Adjusted gross income. Subtract line 9 from line 8	10	•	•	00

Deductions

If claiming a deduction on line 12, you must attach page 12 of your Federal Return, if applicable.

11	Check box a, if you itemize deductions, and enter amount from Schedule A, line 27. Check box b, if you do not itemize deductions, and enter standard deduction (see instructions)	Box a or b MUST be checked	11	•	00
•	☐ a Itemized Deductions • ☐ b Standard Deduction				
12	Federal tax deduction (see instructions)	12	•	•	00
DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S)					
13	Personal exemption (from line 1, 2, 3, or 4)	13	•	•	00
14	Dependent exemption (from page 2, Part III, line 2)	14	•	•	00
15	Total deductions. Add lines 11, 12, 13, and 14	15	•	•	00

Tax

Simple Form(s) W-2, W-2G, and/or 1099 here. Attach Schedule W-2 to return.

16	Taxable income. Subtract line 15 from line 10	16	•	•	00
17	Income tax due. Enter amount from tax table or check if from ☐ Form NOL-85A	17	•	•	00
18	Net tax due Alabama. Check box if computing tax using Schedule OC • ☐ otherwise enter amount from line 17	18	•	•	00
19	Additional taxes (from Schedule ATP, Part I, Line 3)	19	•	•	00
20	Alabama Election Campaign Fund. You may make a voluntary contribution to the following:				
a	Alabama Democratic Party ☐ \$1 ☐ \$2 ☐ none	20a	•	•	00
b	Alabama Republican Party ☐ \$1 ☐ \$2 ☐ none	20b	•	•	00
21	Total tax liability and voluntary contribution. Add lines 18, 19, 20a, and 20b	21	•	•	00

Payments

22	Alabama income tax withheld (from column A, line 5a)	22	•	•	00
23	2023 estimated tax payments/Automatic Extension Payment	23	•	•	00
24	Amended Returns Only - Previous payments (see instructions)	24	•	•	00
25	Refundable Credits. Enter the amount from Schedule OC, Section F, line F4	25	•	•	00
26	Payments from Schedule CP, Section B, Line 1	26	•	•	00
27	Total payments. Add lines 22, 23, 24, 25, and 26	27	•	•	00
28	Amended Returns Only - Previous refund (see instructions)	28	•	•	00
29	Adjusted Total Payments. Subtract line 28 from line 27	29	•	•	00

AMOUNT
YOU OWE

30	If line 21 is larger than line 29, subtract line 29 from line 21, and add line 31 and enter AMOUNT YOU OWE. Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.)	30	•	•	00
31	Penalties (from Schedule ATP, Part II, line 3) (see instructions)	31	•	•	00

OVERPAID

32	If line 29 is larger than line 21, subtract line 21 from line 29, and enter AMOUNT OVERPAID.	32	•	•	00
33	Amount of line 32 to be applied to your 2024 estimated tax	33	•	•	00

Donations

34	Total Donation Check-offs from Schedule DC, line 2	34	•	•	00
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REFUND

35	REFUNDED TO YOU. (CAUTION: You must sign this return on the reverse side.) If line 32 is greater than zero, subtract lines 31, 33, and 34 from line 32.	35	•	•	00
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ADOR