

FORM 40 Alabama 2023 Individual Income Tax Return RESIDENTS & PART-YEAR RESIDENTS



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

Beginning: ● Ending: ●

Your social security number

● 732-54-0302

Spouse's SSN if joint return

●

● Check if primary is deceased
Primary's deceased date (mm/dd/yyyy) ●

● Check if spouse is deceased
Spouse's deceased date (mm/dd/yyyy) ●

Your first name

Initial

Last name

● PRANEETH

●

● DASI

Spouse's first name

Initial

Last name

●

●

●

Present home address (number and street or P.O. Box number)

● 201 UNIVERSITY AVUNE 600

City, town, or post office

● TROY

State

ZIP code

● AL

● 36081

Check if address is outside U.S. ●

Foreign Country

▶ 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

	A - Alabama tax withheld		B - Income	
5a Alabama Income Tax Withheld (from Schedule W-2, line 18, column G)	5a	● 83	5b	● 7,417
5b Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J):			6	● 3
6 Interest and dividend income (also attach Schedule B if over \$1,500)			7	● -303
7 Other income (from page 2, Part I, line 8)			8	● 7,117
8 Total income. Add amounts in the income column for line 5b through line 7			9	●
9 Total adjustments to income (from page 2, Part II, line 16)			10	● 7,117
10 Adjusted gross income. Subtract line 9 from line 8.				

Deductions

If claiming a deduction on line 12, you must attach page 1, 2 and Schedule 1 of your Federal Return, if applicable.

11	●	3,000	15	●	4,500
12	●	0	16	●	2,617
13	●	1,500	17	●	96
14	●		18	●	96
15	●		19	●	0

Tax

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

16	●		20a	●	
17	●		20b	●	
18	●		21	●	96
19	●				

Payments

22	●	83	27	●	83
23	●		28	●	
24	●		29	●	83
25	●				
26	●				

AMOUNT YOU OWE

30	●		31	●	
31	●		32	●	

OVERPAID

32	●		33	●	
33	●		34	●	

Donations

34	●		35	●	
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REFUND

If line 32 is greater than zero, subtract lines 31, 33, and 34 from line 32

For Direct Deposit, check here ● and complete Part V, Page 2.



PART I Other Income (See instructions)	1	Alimony received	1	●
	2	Business income or (loss) (attach Federal Schedule C or C-EZ) (see instructions)	2	●
	3	Gain or (loss) from sale of Real Estate, Stocks, Bonds, etc. (attach Schedule D)	3	● - 303
	4	Retirement Income (attach Schedule RS)	4	●
	5	Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)	5	●
	6	Farm income or (loss) (attach Federal Schedule F)	6	●
	7	Other income (state nature and source — see instructions)	7	●
	8	Total other income. Add lines 1 through 7. Enter here and also on page 1, line 7	8	● - 303

PART II Adjustments to Income (See instructions)	1a	Your IRA deduction	1a	●
	b	Spouse's IRA deduction	1b	●
	2	Payments to a Keogh retirement plan and self-employment SEP deduction	2	●
	3	Penalty on early withdrawal of savings	3	●
	4	Alimony paid. Recipient's last name _____ SSN ● _____	4	●
	5	Adoption expenses	5	●
	6	Moving Expenses (Attach Federal Form 3903) to: City _____ State _____ ZIP _____	6	●
	7	Self-employed health insurance deduction	7	●
	8	Payments to Alabama College Counts 529 Fund or Alabama PACT Program	8	●
	9	Health insurance deduction for small employer employee (see instructions)	9	●
	10	Costs to retrofit or upgrade home to resist wind or flood damage	10	●
	11	Deposits to a catastrophe savings account	11	●
	12	Contributions to a health savings account	12	●
	13	Deposits to an Alabama First-Time and Second Chance Home Buyer Savings Account (see instructions)	13	●
	14	Firefighter's Insurance Premium	14	●
	15	Contributions to an Achieving a Better Life Experience (ABLE) savings account	15	●
16	Total adjustments. Add lines 1 through 15. Enter here and also on page 1, line 9	16	●	

PART III Dependents	1	Total number of dependents from Schedule DS, line 1b	1	●
	2	Amount allowed. Multiply total number of dependents claimed on line 1 by the amount on the dependent chart in the instructions. Enter amount here and on page 1, line 14	2	●

PART IV General Information All Taxpayers Must Complete This Section. (See instructions)	1	Residency Check only one box <input checked="" type="radio"/> Full Year <input type="radio"/> Part Year From _____ 2023 through _____ 2023.
	2	Did you file an Alabama income tax return for the year 2022? <input checked="" type="radio"/> Yes <input type="radio"/> No If no, state reason _____
	3	Give name and address of present employer(s). Yours <u>TROY UNIVERSITY UNIVERSITY AVE TROY AL 36082</u> Your Spouse's _____
	4	Enter the Federal Adjusted Gross Income ● \$ <u>7,117</u> and Federal Taxable Income ● \$ <u>0</u> as reported on your 2023 Federal Individual Income Tax Return.
5	Do you have income which is reported on your Federal return, but not reported on your Alabama return (other than your state tax refund)? <input type="radio"/> Yes <input checked="" type="radio"/> No If yes, enter source(s) and amount(s) below: (other than state income tax refund)	
	Source ● _____ Amount ● _____	
	Source ● _____ Amount ● _____	

PART V Direct Deposit	For Direct Deposit of your refund, complete 1, 2, 3, and 4 below. (See instructions to see if you qualify.)		
	1	Routing Number: _____	2
3	Account Number: _____	4	Is this refund going to or through an account that is located outside of the United States? <input type="checkbox"/> Yes <input type="checkbox"/> No

Drivers License Info	DOB (mm/dd/yyyy) ● _____ Your state ● _____ DL# ● _____	Iss date (mm/dd/yyyy) ● _____	Exp date (mm/dd/yyyy) ● _____
	DOB (mm/dd/yyyy) ● _____ Spouse state ● _____ DL# ● _____	Iss date (mm/dd/yyyy) ● _____	Exp date (mm/dd/yyyy) ● _____

I authorize a representative of the Department of Revenue to discuss my return and attachments with my preparer.
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.

Sign Here In Black Ink Keep a copy of this return for your records.	Your Signature _____	Date _____	Daytime Telephone Number <u>(334) 492-2741</u>	Your Occupation <u>GRADUATE ASSISTANT</u>
	Spouse's Signature (if joint return, BOTH must sign) _____	Date _____	Daytime Telephone Number _____	Spouse's Occupation _____

Paid Preparer's Use Only	Preparer's Signature <u>SYAM PRIYA RAM SAGAR GUPTA</u>	Date <u>04/04/2024</u>	Check if Self-employed <input type="checkbox"/>	Preparer's SSN or PTIN <u>P02082703</u>	E.I. Number <u>84-3171965</u>
	Firm's Name (or yours if self employed) <u>GLOBAL TAXES LLC</u>	Daytime Telephone No. <u>(678) 965-9522</u>	ZIP Code <u>08816</u>		
	Address <u>245 ROONEY CT E BRUNSWICK NJ</u>				



SCHEDULE
ATP

ALABAMA DEPARTMENT OF REVENUE
INCOME TAX ADMINISTRATION DIVISION
Additional Taxes & Penalties

2023

NAME(S) AS SHOWN ON THE TAX RETURN

SOCIAL SECURITY NUMBER

PRANEETH DASI

732-54-0302

PART I Additional Taxes

1	Consumer Use Tax (see instructions). If you certify that no use tax is due, check box <input checked="" type="checkbox"/>	1	●	0
2	Catastrophe savings tax (see instructions)	2	●	
3	Total Additional Taxes. Add line 1 and line 2. Enter here and also on Form 40, page 1, line 19	3	●	0

PART II Penalties

1	Estimated Tax Penalty (see instructions). Farmers and Fishermen that meets IRC §6654, check box <input type="checkbox"/>	1	●	
2	First-time Second chance Home Buyer Savings Account penalty (from Schedule HBC, Part IV, Line 4)	2	●	
3	Total penalties. Add line 1 and line 2. Enter here and also on Form 40, page 1, line 31	3	●	



Alabama Department of Revenue
Wages, Salaries, Tips, etc.

Schedule W-2 must be completed fully and included with your return in order to receive proper credit for your Alabama income tax withheld. Attach a copy of all withholding statements to your return.

NAME(S) AS SHOWN ON TAX RETURN
PRANEETH DASI

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.
732-54-0302

	A Employee's Social Security Number	B Employer's Identification Number (EIN)	C Statutory Employee	D Schedule C/C-EZ Filed?	E State Code	F Alabama Employer's State ID Number	G Alabama State Income Tax Withheld	H Federal Wages (Box 1 of Form W-2)	I Alabama State Wages (Box 16 of Form W-2)	J Additional Taxable Wages - Other States	
1	732-54-0302	636001102	<input type="checkbox"/>	<input type="checkbox"/>	AL	0000038525	83	7,417	7,417		
2			<input type="checkbox"/>	<input type="checkbox"/>							
3			<input type="checkbox"/>	<input type="checkbox"/>							
4			<input type="checkbox"/>	<input type="checkbox"/>							
5			<input type="checkbox"/>	<input type="checkbox"/>							
6			<input type="checkbox"/>	<input type="checkbox"/>							
7			<input type="checkbox"/>	<input type="checkbox"/>							
8			<input type="checkbox"/>	<input type="checkbox"/>							
9			<input type="checkbox"/>	<input type="checkbox"/>							
10			<input type="checkbox"/>	<input type="checkbox"/>							
11			<input type="checkbox"/>	<input type="checkbox"/>							
12			<input type="checkbox"/>	<input type="checkbox"/>							
13			<input type="checkbox"/>	<input type="checkbox"/>							
14			<input type="checkbox"/>	<input type="checkbox"/>							
15			<input type="checkbox"/>	<input type="checkbox"/>							
16	TOTAL ALABAMA TAX WITHHELD FROM W-2s. Total lines 1-15, Column G and enter the amount here . . .						83				
17	ALABAMA TAX WITHHELD FROM 1099s AND W-2Gs. Enter the total Alabama Income Tax Withheld from all Form 1099s and Form W-2Gs received. See instructions on where to report the income from these statements.						0				
18	TOTAL WAGES AND TOTAL ALABAMA TAX WITHHELD FROM W-2s, 1099s, AND W-2Gs. See instructions.						83	7,417	7,417		

THIS SCHEDULE CAN ONLY BE SUBMITTED AND/OR PRINTED VIA LANDSCAPE



(Schedule E is on back)

ATTACH TO FORM 40 — SEE INSTRUCTIONS FOR SCHEDULES D AND E

Name(s) as shown on Form 40

Your social security number

PRANEETH DASI

732-54-0302

Net Profit or Loss From Sale of Real Estate, Stocks, Bonds, etc.

(a) Kind of Property	(b) Date Acquired	(c) Date Sold	(d) Amount Received	(e) Depreciation Allowable Since Acquisition	(f) Cost or Other Basis	(g) Subsequent Improvements	(h) Net Profit or (Loss) (Cols. d & e less Cols. f & g)
FIDELITY BROKERAGE SERVICES LLC	01/01/2023	12/31/2023	4,964		5,267		-303 00
							00
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							00
							00

1 TOTAL NET PROFIT OR (LOSS). Enter here and on Form 40, page 2, Part I, line 3. **1** **- 303 00**

For the year January 1 – December 31, 2023

Your first name and initial PRANEETH Last name DASI

If a joint return, spouse's first name and initial Last name

Your social security number 7 3 2 : 5 4 : 0 3 0 2 Spouse's soc. sec. no. if joint return Telephone number (optional) (334) 492-2741

Home address (number and street). If a P.O. Box, see instructions. 201 UNIVERSITY AVUNE Apt. no. 600

City, town or post office, state, and ZIP code TROY AL 36081

Table with 5 rows: 1 Alabama taxable income (Form 40, line 16 or Form 40NR, line 18) 2 Total tax liability (Form 40, line 21) or Net tax due (Form 40NR, line 20) 3 Total payments (Form 40, line 27 or Form 40NR, line 26) 4 Refund (Form 40, line 35 or Form 40NR, line 33) 5 Amount you owe (Form 40, line 30 or Form 40NR, line 29)

Part II Refund and Payment Information 1 Routing number: 2 Account number: 3 Type of account: 4 Type of transaction: 5 Paper Check (Check this box to have your refund issued by a paper check.)

Part III Declaration of Taxpayer Under penalties of perjury, I declare that I have compared the information contained on my return with the information I have provided to my electronic return originator and that the amounts described in Part 1 above agree with the amounts shown on the corresponding lines of my 2023 Alabama individual income tax return.

Sign Here Your signature Date Spouse's signature. If a joint return, BOTH must sign. Date

Part IV Declaration of Electronic Return Originator (ERO) and Paid Preparer I declare that I have reviewed the above taxpayer's Alabama individual income tax return and that the entries on this form are complete and correctly represented based on all information of which I have any knowledge.

ERO's Use Only ERO's signature Date 04/04/2024 Check if also paid preparer Preparer's PTIN Firm's name (or yours if self-employed) and address GLOBAL TAXES LLC 245 ROONEY CT E BRUNSWICK NJ E.I. No. 84-3171965 ZIP Code 08816

Paid Preparer's Use Only 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. Preparer's signature Date 04/04/2024 Check if self-employed Preparer's PTIN P02082703 Firm's name (or yours if self-employed) and address SYAM PRIYA RAM SAGAR GUPTA 245 ROONEY CT E BRUNSWICK NJ E.I. No. 84-3171965 ZIP Code 08816

DO NOT MAIL TO ALABAMA DEPT. OF REVENUE

ALABAMA DEPARTMENT OF REVENUE
INCOME TAX ADMINISTRATION DIVISION
Individual Income Tax Payment Voucher

NOTE: This payment voucher can only be used to pay the tax liability for your Alabama individual income tax return, automatic extension, or amended tax return and cannot be used for any other kind of tax payment.

When is my tax return and payment due?

Your 2023 return and payment for the full amount of tax due must be mailed by the due date of your federal return. If you elected to file your 2023 return under the automatic extension rule, then the full amount of tax due must be mailed by the due date of your federal return.

How do I pay this amount?

Detach the payment voucher below, fill it out, and mail it along with your payment. You may pay your tax due with check, money order, credit card, E-Check, or ACH Debit. Do not send cash through the mail. If you pay by check or money order, make it payable to Alabama Department of Revenue and write your social security number on the check.

Electronic Payment Option:

You may pay your taxes online using your bank account (e-check), or a debit/credit card through MyAlabamaTaxes.gov. If you have a My Alabama Tax (MAT) account, log on to your account and click on the "Make a Payment" link. If you do not have a MAT account, go to www.myalabamataxes.alabama.gov. Click on the "Make a Payment" link and complete the requested information. Paying by e-check is free. There is a convenience fee for debit/credit card payments.

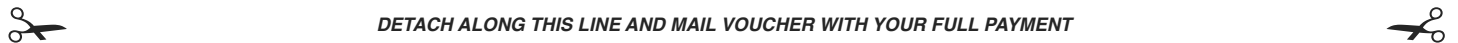
If mailing a payment without a paper return, please use the PO Box as shown below. If mailing Form 40V with your paper return, please use the mailing address as shown on your return.

Form 40 / 40A / 40NR / 40EZ / E40 / E40NR

Automatic Extension

Alabama Department of Revenue
P.O. Box 327467
Montgomery, AL 36132-7467

DO NOT staple or attach your payment or Form 40V to your return or to each other.



DETACH ALONG THIS LINE AND MAIL VOUCHER WITH YOUR FULL PAYMENT

40V 20 23 1555 Vendor Code Individual Income Tax Payment Voucher Alabama Department of Revenue

PRIMARY TAXPAYER'S FIRST NAME PRANEETH SPOUSE'S FIRST NAME LAST NAME DASI
MAILING ADDRESS 201 UNIVERSITY AVUNE 600
CITY TROY STATE AL ZIP 36081 DAYTIME TELEPHONE NUMBER (334) 492-2741

Tax Type: IIT
Tax Period: 12-31-20 23
Primary Taxpayer's SSN: 732-54-0302
Spouse's SSN:
Tax Form: [X] Return [] Amended
[] Automatic Extension Payment
Amount Due: \$ 13.00



DO NOT SUBMIT FORM 40V IF PAYMENT WAS MADE BY E-CHECK, CREDIT CARD, OR ACH DEBIT.

Income Worksheet

2023

Name as Shown on Return
PRANEETH DASI

Social Security Number
732-54-0302

Wages, Salaries, Tips, Etc for Line 5 of Form 40/40NR

Special Type Indicator (X = Income will not be included in your return)
Check this box to exclude income from your Alabama return.

Check this box if you are excluding income and plan to attempt to electronically file your return.

NOTE: Part-year residents may use this worksheet to remove non Alabama source income. Resident and Non-Resident returns may be rejected during electronic filing if you exclude income by marking boxes in the # column.

Table with 6 columns: Payer's name, #, State name, Gross earnings, Alabama wages, Alabama tax withheld. Includes entry for TROY UNIVERSITY and a Total row.

Other Income for Form 40/40NR

Special Type Indicator (X = Income will not be included in your return)
Check this box to exclude income from your Alabama return.

Table with 4 columns: Description, #, Total amount, Alabama amount. Includes a Total row at the bottom.

Dividend Income Statement

2023
Statement DIV

Name(s) shown on return <u>PRANEETH DASI</u>	Social Security Number <u>732-54-0302</u>
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Dividend Income and Adjustments

Payer's Name	Federally Exempt Interest Dividends		Ordinary Dividends	Capital Gain Distributions	Nontax Distributions	Type of Adj & Adj Amt (enter as positive)	U.S. Interest Amount included in Dividends
	*	Amount					
<u>FIDELITY BROKERAGE SERVICES LLC</u>	<input type="checkbox"/>		3.				
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						
	<input type="checkbox"/>						

* Enter 'X' if tax-exempt for Alabama purposes

Summary of Dividends

1	Total Gross Dividends	3.
2	Nominee and Other Adjustments	
3	Exempt-Interest Dividends	
4	US Interest Amount Included in Dividends (net)	
5	Total Adjustment Amount	
6	Subtotal (Line 1 less Line 5)	3.
7	Capital Gains (net)	
8	Nontaxable Distributions (net)	
9	Total of Line 7 and Line 8	
10	Net Dividend Income (Line 6 less Line 9)	3.