



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

Beginning: Ending: Your social security number: Spouse's SSN if joint return: 097-89-3033

Present home address (number and street or P.O. Box number): 1001 20TH STREET SOUTH #1210 CHECK BOX IF AMENDED RETURN

City, town, or post office: BIRMINGHAM State: AL ZIP code: 35205 Check if address is outside U.S.

Filing Status/Exemptions: 1 X \$1,500 Single 3 \$1,500 Married filing separate. Complete Spouse SSN NRA

Table with 2 columns: Description and Amount. Rows include 5a Alabama Income Tax Withheld, 5b Wages, salaries, tips, etc., 6 Interest and dividend income, 7 Other income, 8 Total income, 9 Total adjustments to income, 10 Adjusted gross income.

Table with 2 columns: Description and Amount. Rows include 11 Box a or b MUST be checked, 12 Federal tax deduction, 13 Personal exemption, 14 Dependent exemption, 15 Total deductions.

Table with 2 columns: Description and Amount. Rows include 16 Taxable income, 17 Income Tax due, 18 Net tax due Alabama, 19 Additional taxes, 20 Alabama Election Campaign Fund, 21 Total tax liability and voluntary contribution.

Table with 2 columns: Description and Amount. Rows include 22 Alabama income tax withheld, 23 2023 estimated tax payments, 24 Amended Returns Only - Previous payments, 25 Refundable Credits, 26 Payments from Schedule CP, 27 Total payments, 28 Amended Returns Only - Previous refund, 29 Adjusted Total Payments.

Table with 2 columns: Description and Amount. Rows include 30 AMOUNT YOU OWE, 31 Penalties (from Schedule ATP, Part II, line 3).

Table with 2 columns: Description and Amount. Rows include 32 OVERPAID, 33 Amount of line 32 to be applied to your 2024 estimated tax.

Table with 2 columns: Description and Amount. Rows include 34 Donations, 34 Total Donation Check-offs from Schedule DC, line 2.

Table with 2 columns: Description and Amount. Rows include 35 REFUND, 35 REFUNDED TO YOU. (CAUTION: You must sign this return on the reverse side.)



PART I Other Income <i>(See instructions)</i>	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	●
	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	●

PART II Adjustments to Income <i>(See instructions)</i>	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. <i>(See instructions)</i>	1	Residency Check only one box <input checked="" type="checkbox"/> Full Year <input type="checkbox"/> Part Year From _____ 2023 through _____ 2023.
	2	Did you file an Alabama income tax return for the year 2022? <input type="checkbox"/> Yes <input checked="" type="checkbox"/> No If no, state reason <u>I DON'T HAVE INCOME</u>
	3	Give name and address of present employer(s). Yours <u>UNIVERSITY OF ALABAMA AT BIRMINGHAM BHAM MAIN CAMPUS BIRMINGHAM AL 35294</u> Your Spouse's _____
	4	Enter the Federal Adjusted Gross Income ● \$ <u>46,672</u> and Federal Taxable Income ● \$ <u>32,822</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="checkbox"/> Yes <input checked="" type="checkbox"/> 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 Type: <input type="checkbox"/> Checking <input type="checkbox"/> Savings	3
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# ● _____ lss date (mm/dd/yyyy) ● _____ Exp date (mm/dd/yyyy) ● _____
	DOB (mm/dd/yyyy) ● _____ Spouse state ● _____ DL# ● _____ lss 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 _____	Your Occupation _____
	Spouse's Signature (if joint return, BOTH must sign) _____	Date _____	Daytime Telephone Number _____	Spouse's Occupation _____

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

ALEENA FRANCIS

097-89-3033

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

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.

ALEENA FRANCIS

097-89-3033

	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	097-89-3033	636005396	<input type="checkbox"/>	<input type="checkbox"/>	AL	000052813	1,906	46,672	46,672	
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 ..						1,906			
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.						1,906	46,672	46,672	

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



Taxpayer E-file Opt Out Election Form

General Information

Tax preparers who prepare 11 or more individual income tax returns in any calendar year are required by Alabama Rule 810-3-27-.09, in that calendar year and for each subsequent year thereafter, to file all acceptable Alabama individual income tax returns using electronic medium. Filing paper returns with 2D barcode technology will no longer be allowed in meeting this requirement.

As a taxpayer receiving services from a tax preparer who is required by Alabama law to file all acceptable Alabama individual income tax returns using electronic medium you may elect to "Opt Out." That is, you may elect to not file your return using an electronic medium. Returns submitted electronically are processed faster, more accurately, and at a lower cost to the Department. If you elect to "Opt Out," you are required to complete this form, which must be attached to your original paper individual income tax return. The paper return must have a 2D barcode on it when submitted to the Department with this form.

By signing this form, you have elected to:

NOT file your return electronically.

Reason for election: E-FILING IS NOT ACCEPTED IN E-FILING SOFTWARE

TAXPAYER'S SIGNATURE	DATE 04/04/2024	SPOUSE'S SIGNATURE (IF FILING JOINT RETURN)	DATE
TAXPAYER'S NAME (PLEASE PRINT) ALEENA FRANCIS	SPOUSE'S NAME (IF FILING JOINT RETURN) (PLEASE PRINT)		
PRIMARY'S SSN 097-89-3033	SPOUSE'S SSN (IF FILING JOINT RETURN)		
PREPARER'S OR FIRM'S NAME SYAM PRIYA RAM SAGAR GUPTA	PREPARER'S FEIN / PTIN / SSN 84-3171965	DATE 04/04/2024	

Instructions for Paid Tax Preparers

If you are complying with Alabama Rule 810-3-27-.10 by offering electronic filing, you must file all acceptable Alabama individual income tax returns electronically. If the taxpayer elects not to file electronically, then the taxpayer must complete this form. Attach this form to the taxpayer's Alabama individual income tax return.

If you are complying with Alabama Rule 810-3-27-.10 and the taxpayer elects not to file electronically, you must submit the taxpayer's Alabama individual income tax return with the 2D barcode printed on the return.

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. If you owe and your payment is mailed after the due date of your federal return, you will owe penalties and interest for failure to timely pay. If you are filing a return other than the current tax year or an amended return, the full amount of tax due must be submitted with your 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 Alabama Department of Revenue
Individual Income Tax Payment Voucher

1555
VENDOR CODE

PRIMARY TAXPAYER'S FIRST NAME ALEENA SPOUSE'S FIRST NAME _____ LAST NAME FRANCIS
MAILING ADDRESS 1001 20TH STREET SOUTH #1210
CITY BIRMINGHAM STATE AL ZIP 35205 DAYTIME TELEPHONE NUMBER (205) 427-7648

Tax Type: IIT
Tax Period: 12-31-20 23
Primary Taxpayer's SSN: 097-89-3033
Spouse's SSN: ● _____
Tax Form: ● Return ● Amended
CHECK ONLY ONE BOX ● Automatic Extension Payment
Amount Due: \$ ● 2.00



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

