

FORM 40 Alabama 2018 Individual Income Tax Return RESIDENTS & PART-YEAR RESIDENTS



For the year Jan. 1 - Dec. 31, 2018, or other tax year:

Beginning: Ending: ●
 Your social security number: ● 728-39-1663
 Spouse's SSN if joint return: ●
 Check if primary is deceased Primary's deceased date (mm/dd/yy) ●
 Check if spouse is deceased Spouse's deceased date (mm/dd/yy) ●
 Your first name: ● SRI VENKATA Initial: ● Last name: ● ALLADA
 Spouse's first name: ● Initial: ● Last name: ●

Present home address (number and street or P.O. Box number): ● 6231 LOVE DRIVE 522

City, town or post office: ● IRVING State: ● TX ZIP code: ● 75039 Foreign Country: ●
 Check if address is outside U.S.

▶ CHECK BOX IF AMENDED RETURN ●

Filing Status/	1 ● <input checked="" type="checkbox"/> \$1,500 Single	3 ● <input type="checkbox"/> \$1,500 Married filing separate. Complete Spouse SSN ●	
Exemptions	2 ● <input type="checkbox"/> \$3,000 Married filing joint	4 ● <input type="checkbox"/> \$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	B - Income
	5b Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J):	5a ● 402	5b ● 10,610
	6 Interest and dividend income (also attach Schedule B if over \$1,500)	6 ●	6 ●
	7 Other income (from page 2, Part I, line 9)	7 ●	7 ●
	8 Total income. Add amounts in the income column for line 5b through line 7	8 ●	8 ● 10,610
	9 Total adjustments to income (from page 2, Part II, line 13)	9 ●	9 ●
	10 Adjusted gross income. Subtract line 9 from line 8	10 ●	10 ● 10,610
	11 Box a or b MUST be checked. 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) ● a <input type="checkbox"/> Itemized Deductions ● b <input checked="" type="checkbox"/> Standard Deduction	11 ● 2,500	
	12 Federal tax deduction (see instructions) DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S)	12 ● 0	
	13 Personal exemption (from line 1, 2, 3, or 4)	13 ● 1,500	
14 Dependent exemption (from page 2, Part III, line 2)	14 ●		
15 Total deductions. Add lines 11, 12, 13, and 14	15 ●	15 ● 4,000	
16 Taxable income. Subtract line 15 from line 10	16 ●	16 ● 6,610	
17 Income Tax due. Enter amount from tax table or check if from ● <input type="checkbox"/> Form NOL-85A	17 ●	17 ● 293	
18 Net tax due Alabama. Check box if computing tax using Schedule NTC ● <input type="checkbox"/> , otherwise enter amount from line 17 ...	18 ●	18 ● 293	
19 Consumer Use Tax (see instructions). If you certify that no use tax is due, check box ● <input checked="" type="checkbox"/>	19 ●	19 ● 0	
20 Alabama Election Campaign Fund. You may make a voluntary contribution to the following: a Alabama Democratic Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	20a ●		
b Alabama Republican Party <input type="checkbox"/> \$1 <input type="checkbox"/> \$2 <input type="checkbox"/> none	20b ●		
21 Total tax liability and voluntary contribution. Add lines 18, 19, 20a, and 20b	21 ●	21 ● 293	
22 Alabama income tax withheld (from column A, line 5a)	22 ● 402		
23 2018 estimated tax payments/Automatic Extension Payment	23 ●		
24 Amended Returns Only — Previous payments (see instructions)	24 ●		
25 Refundable Credits. Enter the amount from Schedule RC, line 4	25 ●		
26 Total payments. Add lines 22, 23, 24, and 25	26 ●	26 ● 402	
27 Amended Returns Only — Previous refund (see instructions)	27 ●		
28 Adjusted Total Payments. Subtract line 27 from line 26	28 ●	28 ● 402	
29 If line 21 is larger than line 28, subtract line 28 from line 21, and enter AMOUNT YOU OWE. Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.)	29 ●		
30 Estimated tax penalty. Also include on line 29 (see instructions page 12)	30 ●		
31 If line 28 is larger than line 21, subtract line 21 from line 28, and enter amount OVERPAID	31 ●	31 ● 109	
32 Amount of line 31 to be applied to your 2019 estimated tax	32 ●		
33 Total Donation Check-offs from Schedule DC, line 2	33 ●		
34 REFUNDED TO YOU. (CAUTION: You must sign this return on the reverse side.) Subtract lines 32 and 33 from line 31. For Direct Deposit, check here ● <input checked="" type="checkbox"/> and complete Part V, Page 2.	34 ●	34 ● 109	

You Must Attach page 2 of Federal Form 1040 or Form 1040NR if claiming a deduction on line 12.



PART I

Other Income
(See page 13)

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	●
4a	Total IRA distributions	4b	Taxable amount (see instructions)
5a	Total pensions and annuities	5b	Taxable amount (see instructions)
6	Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)	6	●
7	Farm income or (loss) (attach Federal Schedule F)	7	●
8	Other income (state nature and source — see instructions)	8	●
9	Total other income. Add lines 1 through 8. Enter here and also on page 1, line 7.	9	●

PART II

Adjustments to Income
(See page 16)

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	Total adjustments. Add lines 1 through 12. Enter here and also on page 1, line 9.	13	●

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 on page 10 of Instructions.) Enter amount here and on page 1, line 14	2	●

PART IV

General Information

1 **Residency** Check only one box Full Year Part Year From _____ 2018 through _____ 2018.

2 Did you file an Alabama income tax return for the year 2017? Yes No If no, state reason _____

3 Give name and address of present employer(s). Yours PIONEER CONSULTING SERVICES LLC 1701 48TH STREET SUITE 280 WEST DES MOINES IA 50266
Your Spouse's _____

4 Enter the Federal Adjusted Gross Income ● \$ 10,610 and Federal Taxable Income ● \$ _____ Q as reported on your 2018 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)? Yes No
If yes, enter source(s) and amount(s) below: (other than state income tax refund)

Source ●	Amount ●
Source ●	Amount ●

PART V

For Direct Deposit of your refund, complete 1, 2, 3, and 4 below. (See Page 17 of instructions to see if you qualify.)

Direct Deposit

1 Routing Number: 121000358 2 Type: Checking Savings 3 Account Number: 325083754472

4 Is this refund going to or through an account that is located outside of the United States? Yes No

Drivers License Info

DOB (mm/dd/yyyy) ● <u>XX/XX/XXXX</u>	Your state ● <u>XX</u>	DL# ● <u>XXXXXXXXXX</u>	Iss date (mm/dd/yyyy) ● <u>XX/XX/XXXX</u>	Exp date (mm/dd/yyyy) ● <u>XX/XX/XXXX</u>
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>(510) 737-8831</u>	Your Occupation <u>SOFTWARE ENGINEER</u>
Spouse's Signature (if joint return, BOTH must sign) _____	Date _____	Daytime Telephone Number _____	Spouse's Occupation _____
Preparer's Signature _____	Date _____	Check if Self-employed <input type="checkbox"/>	Preparer's SSN or PTIN ● <u>P02090332</u>
Firm's Name (or yours if self employed) <u>GLOBAL TAXES LLC</u>	Daytime Telephone No. _____	E.I. Number _____	ZIP Code <u>30041</u>
Address <u>2530 PEBBLE CREEK LN CUMMING GA</u>			

Your first name and initial: **SRI VENKATA** Last name: **ALLADA**
If a joint return, spouse's first name and initial: Last name:

Your social security number: **7 2 8 3 9 1 6 6 3**
Spouse's soc. sec. no. if joint return:
Telephone number (optional): **(510) 737-8831**

Home address (number and street). If a P.O. Box, see instructions: **6231 LOVE DRIVE** Apt. no.: **522**
City, town or post office, state, and ZIP code:

IRVING TX 75039

Part I	
Tax Return Information (Whole dollars only.)	
1 Alabama taxable income (Form 40, line 16 or Form 40NR, line 18)	1 6,610
2 Total tax liability (Form 40, line 21) or Net tax due (Form 40NR, line 20)	2 293
3 Total payments (Form 40, line 26 or Form 40NR, line 26)	3 402
4 Refund (Form 40, line 34 or Form 40NR, line 33)	4 109
5 Amount you owe (Form 40, line 29 or Form 40NR, line 29)	5

Part II
Refund and Payment Information

1 Routing number:

1	2	1	0	0	0	3	5	8
---	---	---	---	---	---	---	---	---

2 Account number:

3	2	5	0	8	3	7	5	4	4	7	2						
---	---	---	---	---	---	---	---	---	---	---	---	--	--	--	--	--	--

3 Type of account: Checking Savings

4 Type of transaction: Direct Deposit Direct Debit

5 Paper Check (Check this box to have your refund issued by a paper check.)

Part III
Declaration of Taxpayer
(Sign only after Part I is completed.)

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 2018 Alabama individual income tax return. To the best of my knowledge and belief, this return, including any accompanying schedules and statements, is true, correct, and complete. Also, I hereby authorize the Alabama Department of Revenue to disclose to my ERO described below, any information concerning the disbursement of the refund requested or any problems encountered in the processing of my return.

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

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
(See instructions.)

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. I also declare that I have followed all other requirements described in IRS PUB. 1345, Revenue Procedures for Electronic Filing of Individual Income Tax Returns (Tax Year 2018), and the Alabama Handbook for Electronic Filers of Individual Income Tax Returns (Tax Year 2018). By using a computer system and software to prepare and transmit my client's return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create my client's return and to the electronic transmission of my client's tax return to the **Alabama Department of Revenue**, as applicable by law. **If I am also the paid 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.**

ERO's Use Only

ERO's signature: _____ Date: _____ Check if also paid preparer: Preparer's PTIN: **P02090332**

Firm's name (or yours if self-employed) and address: **GLOBAL TAXES LLC**
2530 PEBBLE CREEK LN CUMMING GA E.I. No. **30-1017196** ZIP Code **30041**

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: _____ Check if self-employed: Preparer's PTIN: **P02090332**

Firm's name (or yours if self-employed) and address: **APPANA RUPA VENKATA SATYA SAI MANIKUMAR**
2530 PEBBLE CREEK LN CUMMING GA E.I. No. ZIP Code **30041**



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
SRI VENKATA ALLADA

PRIMARY'S SOCIAL SECURITY NO. SPOUSE'S SOCIAL SECURITY NO.
728-39-1663

A	B	C	D	E	F	G	H	I	J	
Employee's Social Security Number on W-2	Employer's Identification Number (EIN)	Statutory Employee	Schedule C/C-EZ Filed?	State Code	Alabama Employer's State ID Number	Alabama State Income Tax Withheld	Federal Wages (Box 1 of Form W-2)	Alabama State Wages (Box 16 of Form W-2)	Additional Taxable Wages - Other States	
1 • 728-39-1663	• 274131205	• <input type="checkbox"/>	• <input type="checkbox"/>	• AL	• 010033731	• 402	• 10,610	• 10,610	•	
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.					• 402				
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.					• 402	• 10,610	• 10,610	•	

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

Alabama Information Worksheet

2018

Keep for your records

Part I - Personal Information

Taxpayer:

First Name SRI VENKATA
Middle Initial Suffix
Last Name ALLADA
Social Security No. 728-39-1663
Occupation SOFTWARE ENGINEER
Date of Birth 02/10/1992
Date of Death
Resident State AL
Work Phone (510) 737-8831
Home Phone

Spouse:

First Name
Middle Initial Suffix
Last Name
Social Security No.
Occupation
Date of Birth
Date of Death
Resident State
Work Phone

Print taxpayer phone number on the main form
Print spouse phone number on the main form

Home Taxpayer work
Home Spouse work

Address 6231 LOVE DRIVE Apt 522
City IRVING State . TX ZIP Code . 75039
Country, if foreign

Part II - Main Forms

X Form 40 : Resident Tax Return (Long form)
Form 40NR : Nonresident Tax Return
Form 40 : Part-Year Resident Tax Return
Part-Year residents must complete the Part-Year Worksheet
From , 2018 to , 2018. Number of months

Alabama special rules for part-year resident with Alabama source income while nonresident:

Yes No
Did you receive Alabama source income while a nonresident of Alabama?

Part III - Filing Status

X Single
Married filing joint return
Married filing separate return.
Spouse name. Social security number .
Last First
Enter 'X' if you did not live with your spouse during the year.
Enter 'X' if married filing separate and you cannot itemize deductions
Unmarried head of family (with qualifying person). Qualifying person's
name, social security number and relationship. Name
Social security number Relationship

Part IV - Form 2210 Information

Enter tax liability from 2017 return Form 40, line 18 or Form 40NR line 20
Do not file Alabama Form 2210AL
Enter adjusted gross income from 2017 return Form 40, line 10 or Form 40NR, line 12

Part V – General Information

Yes No

[X] [] Did you file an Alabama income tax return for the year 2017?

If no, state reason why

Name and address of your present employer:

Taxpayer:

Table with 5 columns: Employer Name, Address, City, ST, Zip. Row 1: PIONEER CONSULTING SERVICES LLC, 1701 48TH STREET SUITE 280, WEST DES MOINES, IA, 50266. Row 2: Retired. Row 3: None.

Spouse:

Table with 5 columns: Employer Name, Address, City, ST, Zip. All fields are empty.

Full and Part Year Residents only:

Yes No

[] [X] Do you have income that is reported in your federal return but not reported in your Alabama return?

If yes, enter source(s) and amount(s) below: (other than state income tax refund)

Table with 2 columns: Source, Amount. Four rows for source and amount entries.

Yes No Do you have any income earned in the year that your spouse was killed in action in a designated combat zone?

[] [] If yes, enter the total amount of income not taxable in Alabama

Part VI – Electronic Filing Information

New! State e-file disclosure consent:

By using a computer system and software to prepare and transmit my client's return electronically, I consent to the disclosure of all information pertaining to my use of the system and software to create my client's return and to the electronic transmission of my client's tax return to the Alabama Department of Revenue, as applicable by law.

[X] Filed the Alabama return electronically

Electronic PDF Attachments

PDF's that you have selected to attach to your state e-file return are listed below.

Table with 2 columns: Description, Filename. Two empty rows.

Driver's License for Electronic Filing

Table with 3 columns: Taxpayer, Spouse. Rows for State Issued Driver's License, Driver's License Number, Date Driver's License Issued, Date Driver's License Expires.

State ID for Electronic Filing

Table with 3 columns: Taxpayer, Spouse. Rows for Issuing State, State Identification number, State ID Issue Date, State ID Expiration Date.

EF Status Dates:

Enter the date return was EFiled 02/15/2019
Enter the date return was accepted by the state 02/15/2019

QuickZoom to Form 8453 filing instructions SmartWorksheet

Part VII – Direct Deposit Information or Electronic Funds Withdrawal Information

- Yes No
 Use **direct deposit** for **state tax refund**?
 * See Tax Help for refund expectation.
 Use **paper check** for **state tax refund**?
 Use **Electronic Funds Withdrawal** for **state tax payment** (Electronic Filing Only)?

Bank Information

If you selected direct deposit or electronic funds withdrawal, fill out the information below:

Name of Financial Institution (optional) BANK OF AMERICA
 Account type Checking Savings
 Routing number 121000358
 Account number 325083754472
 Enter the payment date to withdraw from the account above _____
 State balance-due amount from this return _____

International ACH Transactions

- Yes No
 Will the funds for this refund (or payment) go to (or come from) an account outside the U.S.?

Part VIII– Paid Preparer Information

Enter the date Form AL40V was given to client _____
 Enter the preparer's assigned code from Preparer's Information Worksheet 1

Note: To electronically file a "self-prepared" or "non-paid preparer" tax return, the following is required:

Preparer Name ▶ _____
 Preparer PTIN ▶ _____

- Yes No
 I authorize a representative of the Department of Revenue to discuss my return and attachments and attachments with my preparer

Part IX – Taxes deductible on Line 6 of Schedule A that were paid in prior years

1	Prior Year(s) Self-employment tax paid in 2017 and prior years	1	_____
2	Social security/Medicare tax on tips paid in 2017 and prior years	2	_____
3	Household employment taxes paid in 2017 and prior years	3	_____

Part X – Extension Status

- Yes No
 Tax return due date extended?
 Extended due date . . . _____
QuickZoom to Form 40V ▶ _____
QuickZoom here to Form 40 ▶
QuickZoom here to Form 40NR ▶

Tax Payments Worksheet

2018

▶ Keep for your records

Name SRI VENKATA ALLADA	Social Security Number 728-39-1663
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Tax Payments for the Current Year

		State	
		Date	Payment
1	First Payment		
2	Second Payment		
3	Third Payment		
4	Fourth Payment		
Additional Payments			
5	Payment		
	Payment		
	Payment		
	Payment		
	Payment		
6	Overpayment from previous year applied to current year	6	
7	Amount paid with current year extension	7	
8	Total tax payments	8	

Income Taxes Withheld for the Current Year

9	State withholding on Forms W-2	9	402.
10	State withholding on Forms W-2G	10	
11	State withholding on Forms 1099-R	11	
12 a	State withholding on Forms 1099-MISC	12 a	
b	State withholding on Forms 1099-G	b	
c	State withholding on Forms 1099-K	c	
13	Other state tax withholding	13	
14	Total income tax withheld	14	402.
15	Date return will be filed and balance paid	15	

Smart Worksheets from your 2018 Alabama Tax Return

SMART WORKSHEET FOR: Form 8453: Declaration for Electronic Filing

Additional Information Smart Worksheet	
A	Date this return was E-Filed ▶ <u>02/15/2019</u>
B	Date return was accepted by the state ▶ <u>02/15/2019</u>
C	Documents to attach to the FRONT of Form AL8453: <u>Form W-2 (Copy 2)</u> _____ _____ _____
D	Document to attach to the BACK of Form AL8453: _____ _____ _____ _____
E	Retain Form AL8453 and all attachments for a period of three years DO NOT MAIL TO STATE AUTHORITIES