

# What You Can Submit for Federal Income Tax Returns

**1040** Department of the Treasury Internal Revenue Service  
**U.S. Individual Income Tax Return 2008** (Use only if you are not filing a joint return with a spouse.)

**Label** (See page 10) Your name and address Last name First name Middle initial (if any) Social Security number

**Use the IRS label.** (See page 10) Enter address number and street, if you have a P.O. box, see page 10. Apt. no. (If you have a post office, street, and ZIP code, if you have a foreign address, see page 10.)

**Important!** You must enter your SSN on this form.

**Filing Status** (See page 10)  Single  Married filing jointly (See page 10)  Head of household (See page 10)  Married filing separately (See page 10)  Qualifying widow(er) with dependent child (See page 10)

**Exemptions** (See page 10)  Yourself  Spouse  Dependent (See page 10)  Other (See page 10)

**Income** (See page 10) 1 Wages, salaries, tips, etc. (Attach Form W-2) 2 Taxable interest (Attach Schedule B if required) 3 Tax-exempt interest (Do not include on line 8a) 4a Ordinary dividends (Attach Schedule D if required) 4b Qualified dividends (see page 20) 5a Dividend capital gains (see page 20) 5b Dividend capital losses (see page 20) 6a Dividend capital gains (see page 20) 6b Dividend capital losses (see page 20) 7 Taxable refunds, credits, or offsets of state and local income taxes (see page 20) 8a Unemployment compensation (see page 20) 8b Alaska Permanent Fund dividends (see page 20) 9a Taxable annuities, pensions, IRAs, etc. (Attach Form R-109-R) 9b Taxable IRA distributions (see page 20) 10a IRA distributions (see page 20) 10b Taxable amount (see page 20) 11a IRA distributions (see page 20) 11b Taxable amount (see page 20) 12a Pension and annuities (see page 20) 12b Taxable amount (see page 20) 13 Unemployment compensation and Alaska Permanent Fund dividends (see page 20) 14a Social Security benefits (see page 20) 14b Taxable amount (see page 20) 15 Add lines 7 through 14b (for right column). This is your total income. 16 Educator expenses (see page 20) 17 IRA deduction (see page 20) 18 Student loan interest deduction (see page 20) 19 Health savings account deduction (see page 20) 20 Self-employed health insurance deduction (see page 20) 21 Self-employed health insurance deduction (see page 20) 22 Self-employed health insurance deduction (see page 20) 23 Penalty on early withdrawal of savings (see page 20) 24 Any other deduction (see page 20) 25 Add lines 16 through 24. This is your adjusted gross income.

**1040**  
(consists of two pages)

**1040A** Department of the Treasury Internal Revenue Service  
**U.S. Individual Income Tax Return 2008** (Use only if you are not filing a joint return with a spouse.)

**Label** (See page 10) Your name and address Last name First name Middle initial (if any) Social Security number

**Use the IRS label.** (See page 10) Enter address number and street, if you have a P.O. box, see page 10. Apt. no. (If you have a post office, street, and ZIP code, if you have a foreign address, see page 10.)

**Important!** You must enter your SSN on this form.

**Filing Status** (See page 10)  Single  Married filing jointly (See page 10)  Head of household (See page 10)  Married filing separately (See page 10)  Qualifying widow(er) with dependent child (See page 10)

**Exemptions** (See page 10)  Yourself  Spouse  Dependent (See page 10)  Other (See page 10)

**Income** (See page 10) 7 Wages, salaries, tips, etc. (Attach Form W-2) 8a Taxable interest (Attach Schedule B if required) 8b Tax-exempt interest (Do not include on line 8a) 9a Ordinary dividends (Attach Schedule D if required) 9b Qualified dividends (see page 20) 10a Capital gain distributions (see page 20) 10b Taxable amount (see page 20) 11a IRA distributions (see page 20) 11b Taxable amount (see page 20) 12a Pension and annuities (see page 20) 12b Taxable amount (see page 20) 13 Unemployment compensation and Alaska Permanent Fund dividends (see page 20) 14a Social Security benefits (see page 20) 14b Taxable amount (see page 20) 15 Add lines 7 through 14b (for right column). This is your total income. 16 Educator expenses (see page 20) 17 IRA deduction (see page 20) 18 Student loan interest deduction (see page 20) 19 Health savings account deduction (see page 20) 20 Self-employed health insurance deduction (see page 20) 21 Self-employed health insurance deduction (see page 20) 22 Self-employed health insurance deduction (see page 20) 23 Penalty on early withdrawal of savings (see page 20) 24 Any other deduction (see page 20) 25 Add lines 16 through 24. This is your adjusted gross income.

**1040A**  
(consists of two pages)

**1040EZ** Department of the Treasury Internal Revenue Service  
**Income Tax Return for Single and Joint Filers With No Dependents 2008** (Use only if you are not filing a joint return with a spouse.)

**Label** (See page 10) Your name and address Last name First name Middle initial (if any) Social Security number

**Use the IRS label.** (See page 10) Enter address number and street, if you have a P.O. box, see page 10. Apt. no. (If you have a post office, street, and ZIP code, if you have a foreign address, see page 10.)

**Important!** You must enter your SSN on this form.

**Income** (See page 10) 1 Wages, salaries, tips, etc. (Attach Form W-2) 2 Taxable interest (Attach Schedule B if required) 3 Unemployment compensation and Alaska Permanent Fund dividends (see page 10) 4 Add lines 1, 2, and 3. This is your adjusted gross income. 5 Can your parents or someone else claim you as a dependent? Yes  No  (If "No," enter SSN) 6 Subtract line 5 from line 4. If line 5 is larger than line 4, enter "0." This is your taxable income. 7 Federal income tax withheld from box 2 of your Form(s) W-2 8a Estimated tax paid (see page 10) 8b Nonrefundable credits (see page 10) 9 Add lines 7, 8a, and 8b. This is your total tax payments. 10 Tax. Use the amount in line 9 above or the tax you owe in line 6. If the amount in line 9 is less than the amount in line 6, enter the difference on this line. 11a If line 9 is larger than line 10, subtract line 10 from line 9. This is your refund. 11b If line 10 is larger than line 9, subtract line 9 from line 10. This is the amount you owe. The amount on line 10 may be zero. 12 If line 10 is larger than line 9, subtract line 9 from line 10. This is the amount you owe. The amount on line 10 may be zero.

**1040EZ**

**If you do not have a copy of your 2008 return, you may obtain a copy of your federal tax return information by requesting a transcript (individuals):**

You have two easy and convenient options for getting copies of your federal tax return transcripts by phone or by mail.

Request a transcript by calling 1-800-829-1040 or order by mail using **IRS Form 4506T** (request a **Tax Return Transcript** and let them know to **NOT** send an Account Transcript).

The Internal Revenue Service does not charge a fee for transcripts. Allow two weeks for delivery.

**Definitions:**

A **tax return transcript** shows most line items from your tax return (Form 1040, 1040A or 1040EZ) as it was originally filed, including any accompanying forms and schedules. It does not reflect any changes you, your representative or the IRS made after the return was filed. In many cases, a tax return transcript will meet the requirements of lending institutions such as those offering mortgages and for applying for student loans.

**IMPORTANT: If you have filed an amended 1040/1040A, you must submit the amended return along with a copy of your original Federal Income Tax Return.**