

40601

9998

Utah State Tax Commission
Utah Individual Income Tax Return
 All State Income Tax Dollars Fund Education

2016
TC-40

• Amended Return - enter code: _____ (code 1 - 5 from instructions)

Your Social Security No. ██████████	Your first name Richard	Your last name Bristol	If deceased, complete page 3, Part 1
Spouse's Soc. Sec. No.	Spouse's first name	Spouse's last name	
Address ██		Telephone number ██████████	
City South Jordan	State UT	ZIP+4 84095	Foreign country (if not U.S.)

1 Filing Status - enter code 1 = Single • <u>1</u> 2 = Married filing jointly 3 = Married filing separately 4 = Head of household 5 = Qualifying widow(er) <small>If using code 2 or 3, enter spouse's name and SSN above</small>	• 2 Exemptions - enter number a <u>1</u> Yourself* b _____ Spouse* c _____ Dependents* d _____ Dependents with a disability e <u>1</u> Total exemptions (add a through d) <small>* from federal return</small>	3 Election Campaign Fund - enter code <small>Does not increase your tax or reduce your refund</small> C = Constitution D = Democratic Yourself Spouse M = Independent American <u>N</u> _____ L = Libertarian R = Republican N = No contribution
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4 Federal adjusted gross income from federal return	• 4	0.00
5 Additions to income from TC-40A, Part 1 (attach TC-40A, page 1)	• 5	0.00
6 Total income - add line 4 and line 5	6	0.00
7 State tax refund included on federal form 1040, line 10, if any	• 7	0.00
8 Subtractions from income from TC-40A, Part 2 (attach TC-40A, page 1)	• 8	0.00
9 Utah taxable income (loss) - subtract the sum of lines 7 and 8 from line 6	• 9	0.00
10 Utah tax - multiply line 9 by 5% (.05) (not less than zero)	• 10	0.00
11 Exemption amount - multiply line 2e by \$3,038 (if line 4 over \$155,650, see instr.)	• 11	3038.00
12 Federal standard or itemized deductions	• 12	6300.00
13 Add line 11 and line 12	13	9338.00
14 State income tax deducted on federal Schedule A, line 5, if any	• 14	0.00
15 Subtract line 14 from line 13	15	9338.00
16 Initial credit before phase-out - multiply line 15 by 6% (.06)	• 16	560.00
17 Enter: \$13,867 (if single or married filing separately); \$20,801 (if head of household); or \$27,734 (if married filing jointly or qualifying widower)	• 17	13867.00
18 Income subject to phase-out - subtract line 17 from line 9 (not less than zero)	18	0.00
19 Phase-out amount - multiply line 18 by 1.3% (.013)	• 19	0.00
20 Taxpayer tax credit - subtract line 19 from line 16 (not less than zero)	• 20	560.00
21 If you are a qualified exempt taxpayer, enter "X" (complete worksheet in instr.)	• 21	_____
22 Utah income tax - subtract line 20 from line 10 (not less than zero)	• 22	0.00

Electronic filing is quick, easy and free, and will speed up your refund.

To learn more, go to taxexpress.utah.gov

23	Enter tax from TC-40, page 1, line 22	23	<u> </u>	0.00
24	Apportionable nonrefundable credits from TC-40A, Part 3 (attach TC-40A, page 1)	• 24	<u> </u>	0.00
25	Full-year resident, subtract line 24 from line 23 (not less than zero) Non or Part-year resident, enter the tax from TC-40B, line 38	• 25	<u> </u>	0.00
26	Nonapportionable nonrefundable credits from TC-40A, Part 4 (attach TC-40A, page 1)	• 26	<u> </u>	0.00
27	Subtract line 26 from line 25 (not less than zero)	27	<u> </u>	0.00
28	Voluntary contributions from TC-40, page 3, Part 4 (attach TC-40, page 3)	• 28	<u> </u>	0.00
29	AMENDED RETURN ONLY - previous refund	• 29	<u> </u>	0.00
30	Recapture of low-income housing credit	• 30	<u> </u>	0.00
31	Utah use tax	• 31	<u> </u>	0.00
32	Total tax, use tax and additions to tax (add lines 27 through 31)	32	<u> </u>	0.00
33	Utah income tax withheld shown on TC-40W, Part 1 (attach TC-40W, page 1)	• 33	<u> </u>	561.00
34	Credit for Utah income taxes prepaid from TC-546 and 2015 refund applied to 2016	• 34	<u> </u>	0.00
35	Pass-through entity withholding tax shown on TC-40W, Part 3 (attach TC-40W, page 2)	• 35	<u> </u>	0.00
36	Mineral production withholding tax shown on TC-40W, Part 2 (attach TC-40W, page 2)	• 36	<u> </u>	0.00
37	AMENDED RETURN ONLY - previous payments	• 37	<u> </u>	0.00
38	Refundable credits from TC-40A, Part 5 (attach TC-40A, page 2)	• 38	<u> </u>	0.00
39	Total withholding and refundable credits - add lines 33 through 38	39	<u> </u>	561.00
40	TAX DUE - subtract line 39 from line 32 (not less than zero)	• 40	<u> </u>	0.00
41	Penalty and interest (see instructions)	41	<u> </u>	0.00
42	TOTAL DUE - PAY THIS AMOUNT - add line 40 and line 41	• 42	<u> </u>	0.00
43	REFUND - subtract line 32 from line 39 (not less than zero)	• 43	<u> </u>	561.00
44	Voluntary subtractions from refund (not greater than line 43) Enter the total from page 3, Part 5	• 44	<u> </u>	0.00
45	DIRECT DEPOSIT YOUR REMAINING REFUND - provide account information (see instructions for foreign accounts) checking savings			
	• Routing number <u> </u>	• Account number <u> </u>	Account type: • <u> </u> • <u> </u>	

Under penalties of perjury, I declare to the best of my knowledge and belief, this return and accompanying schedules are true, correct and complete.

SIGN Your signature Richard L. Bristol Date 3/29/17 Spouse's signature (if filing jointly) _____ Date _____

HERE

Third Party Designee	Name of designee (if any) you authorize to discuss this return	Designee's telephone number	Designee PIN
Paid Preparer's Section	Preparer's signature _____ Date _____	Preparer's telephone number	Preparer's PTIN
	Firm's name and address		Preparer's EIN

Attach TC-40 page 3 if you: are filing for a deceased taxpayer, are filing a fiscal year return, filed IRS form 8886, are making voluntary contributions, want to deposit into a UESP account, want to apply all/part of your refund to next year's taxes, want to send a direct deposit to a foreign account, or no longer qualify for a homeowner's exemption.

Line Explanations	IMPORTANT
1 Employer/payer ID number from W-2 box "b" or 1099 2 Utah withholding ID number from W-2 box "15" or 1099 (14 characters, ending in WTH, no hyphens) 3 Employer/payer name and address from W-2 box "c" or 1099 4 Enter "X" if reporting Utah withholding from form 1099 5 Employee's Social Security number from W-2 box "a" or 1099 6 Utah wages or income from W-2 box "16" or 1099 7 Utah withholding tax from W-2 box "17" or 1099	Do not send your W-2s or 1099s with your return. Instead enter W-2 or 1099 information below, but only if there is Utah withholding on the form. Use additional forms TC-40W if you have more than four W-2s and/or 1099s with Utah withholding tax. Enter mineral production withholding from TC-875R in Part 2 of TC-40W; enter pass-through entity withholding in Part 3 of TC-40W.
First W-2 or 1099 1 [REDACTED] 2 [REDACTED] (14 characters, no hyphens) 3 [REDACTED] INC [REDACTED] SALT LAKE CITY UT 84104 4 _____ 5 [REDACTED] 6 _____ 0.00 7 _____ 561.00	Second W-2 or 1099 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00
Third W-2 or 1099 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00	Fourth W-2 or 1099 1 _____ 2 _____ (14 characters, no hyphens) 3 _____ _____ _____ 4 _____ 5 _____ 6 _____ .00 7 _____ .00

Enter total Utah withholding tax from all lines 7 here and on TC-40, page 2, line 33: 561.00

Submit page ONLY if data entered.
 Attach completed schedule to your Utah Income Tax Return.
 Do not attach W-2s or 1099s to your Utah return.

Substitute for Form W-2, Wage and Tax Statement, or Form 1099-R, Distributions From Pensions, Annuities, Retirement or Profit-Sharing Plans, IRAs, Insurance Contracts, etc.

OMB No. 1545-0074

Department of the Treasury
Internal Revenue Service

▶ Attach to Form 1040, 1040A, 1040-EZ, or 1040X.

▶ Information about Form 4852 is available at www.irs.gov/form4852.

1 Name(s) shown on return RICHARD L BRISTOL	2 Your social security number [REDACTED]																								
3 Address [REDACTED], SOUTH JORDAN, UT 84095																									
4 Enter year in space provided and check one box. For the tax year ending December 31, <u>2016</u> , I have been unable to obtain (or have received an incorrect) <input checked="" type="checkbox"/> Form W-2 OR <input type="checkbox"/> Form 1099-R. I have notified the IRS of this fact. The amounts shown on line 7 or line 8 are my best estimates for all wages or payments made to me and tax withheld by my employer or payer named on line 5.																									
5 Employer's or payer's name, address, and ZIP code [REDACTED] INC [REDACTED], SALT LAKE CITY, UT, 84104	6 Employer's or payer's identification number (if known) [REDACTED]																								
7 Form W-2. Enter wages, tips, other compensation, and taxes withheld. <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%;">a Wages, tips, and other compensation</td> <td style="width:10%; text-align: right;">0.00</td> <td style="width:50%;">f State income tax withheld</td> <td style="width:10%; text-align: right;">561.00</td> </tr> <tr> <td>b Social security wages</td> <td style="text-align: right;">0.00</td> <td>(Name of state)</td> <td style="text-align: right;">UTAH</td> </tr> <tr> <td>c Medicare wages and tips</td> <td style="text-align: right;">0.00</td> <td>g Local income tax withheld</td> <td style="text-align: right;">0.00</td> </tr> <tr> <td>d Social security tips</td> <td style="text-align: right;">0.00</td> <td>(Name of locality)</td> <td></td> </tr> <tr> <td>e Federal income tax withheld</td> <td style="text-align: right;">2,289.49</td> <td>h Social security tax withheld</td> <td style="text-align: right;">4,341.57</td> </tr> <tr> <td></td> <td></td> <td>i Medicare tax withheld</td> <td style="text-align: right;">1,015.37</td> </tr> </table>		a Wages, tips, and other compensation	0.00	f State income tax withheld	561.00	b Social security wages	0.00	(Name of state)	UTAH	c Medicare wages and tips	0.00	g Local income tax withheld	0.00	d Social security tips	0.00	(Name of locality)		e Federal income tax withheld	2,289.49	h Social security tax withheld	4,341.57			i Medicare tax withheld	1,015.37
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8 Form 1099-R. Enter distributions from pensions, annuities, retirement/profit-sharing plans, IRAs, insurance contracts, etc. <table style="width:100%; border-collapse: collapse;"> <tr> <td style="width:50%;">a Gross distribution</td> <td style="width:10%;"></td> <td style="width:50%;">f Federal income tax withheld</td> <td style="width:10%;"></td> </tr> <tr> <td>b Taxable amount</td> <td></td> <td>g State income tax withheld</td> <td></td> </tr> <tr> <td>c Taxable amount not determined</td> <td style="text-align: center;"><input type="checkbox"/></td> <td>h Local income tax withheld</td> <td></td> </tr> <tr> <td>d Total distribution</td> <td style="text-align: center;"><input type="checkbox"/></td> <td>i Employee contributions</td> <td></td> </tr> <tr> <td>e Capital gain (included in line 8b)</td> <td></td> <td>j Distribution codes</td> <td></td> </tr> </table>		a Gross distribution		f Federal income tax withheld		b Taxable amount		g State income tax withheld		c Taxable amount not determined	<input type="checkbox"/>	h Local income tax withheld		d Total distribution	<input type="checkbox"/>	i Employee contributions		e Capital gain (included in line 8b)		j Distribution codes					
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9 How did you determine the amounts on lines 7 and 8 above? Amounts were determined from the W-2 issued by payer listed on line 5 herein. Payer erroneously alleged IRC section 3121(a) and IRC section 3401(a) transactions. This claim is hereby rebutted. I am a private sector worker and payer is a private sector company not engaged in a privileged activity. The amounts shown on line 7 (a through j) herein are to the best of my knowledge and belief, true, correct and complete.																									
10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement. Not required																									

General Instructions

Section references are to the Internal Revenue Code.

Future developments. The IRS has created a page on www.irs.gov for information about Form 4852, at www.irs.gov/form4852. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be posted on that page.

Purpose of form. Form 4852 serves as a substitute for Forms W-2, W-2c, and 1099-R and is completed by you or your representatives when (a) your employer or payer does not issue you a Form W-2 or Form 1099-R or (b) an employer or payer has issued an incorrect Form W-2 or Form 1099-R. Attach this form to the back of your income tax return, before any supporting forms or schedules.

You should always attempt to get Form W-2, Form W-2c, or Form 1099-R from your employer or payer before contacting the IRS or filing Form 4852. If you do not receive the missing or corrected form from your employer or payer by February 14, you may call the IRS at 1-800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment, and your employer's or payer's name, address (including ZIP code), and phone number. The IRS will contact your employer or payer and request the missing form. The IRS also will send you a Form 4852. If you do not receive the missing form in sufficient time to file your income tax return timely, you may use the Form 4852 that the IRS sent you.

If you received an incorrect Form W-2 or Form 1099-R, you should always attempt to have your employer or payer issue a corrected form before filing Form 4852.

Note. Retain a copy of Form 4852 for your records. To help protect your social security benefits, keep a copy of Form 4852 until you begin receiving social security benefits, just in case there is a question about your work record and/or earnings in a particular year. After September 30 following the date shown on line 4, you may use a my Social Security online account to verify wages reported by your employers. Please visit www.ssa.gov/myaccount. Or, you may contact your local SSA office to verify wages reported by your employer.

Will I need to amend my return? If you receive a Form W-2, Form W-2c, or Form 1099-R after your return is filed with Form 4852, and the information differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return.

Penalties. The IRS will challenge the claims of individuals who attempt to avoid or evade their federal tax liability by using Form 4852 in a manner other than as prescribed. Potential penalties for the improper use of Form 4852 include:

- Accuracy-related penalties equal to 20 percent of the amount of taxes that should have been paid,
- Civil fraud penalties equal to 75 percent of the amount of taxes that should have been paid, and