



Alabama Individual Income Tax Return
RESIDENTS & PART-YEAR RESIDENTS

For the year Jan. 1 - Dec. 31, 2017, or other tax year: Beginning: Ending:

Your last name: **Scott** Initial: Last name: **Hannon**

Spouse's first name: Spouse's last name:

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

City, town or post office: **Birmingham** State: **AL** ZIP code:

Check if address is outside U.S. Foreign Country:

Your social security number:

Check if primary is deceased Primary's deceased date (mm/dd/yy):

Spouse's social security number:

Check if spouse is deceased Spouse's deceased date (mm/dd/yy):

CHECK BOX IF AMENDED RETURN ADOR

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

2 \$3,000 Married filing joint 4 \$3,000 Head of Family (with qualifying person).

Income and Adjustments	A - Alabama tax withheld		B - Income	
	5a		5b	
5a Alabama Income Tax Withheld (from Schedule W-2, line 18, column G)	4,799	00		
5b Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J)			-0-	00
6 Interest and dividend income (also attach Schedule B if over \$1,500)			2	00
7 Other income (from page 2, Part I, line 9)			-0-	00
8 Total income. Add amounts in the income column for line 5b through line 7			2	00
9 Total adjustments to income (from page 2, Part II, line 12)			-0-	00
10 Adjusted gross income. Subtract line 9 from line 8			2	00

Deductions	Box a or b MUST be checked		15	
	11			
11 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)	<input type="checkbox"/> a	<input checked="" type="checkbox"/> b	2,500	00
12 Federal tax deduction (see instructions). DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S)			-0-	00
13 Personal exemption (from line 1, 2, 3, or 4)			1,500	00
14 Dependent exemption (from page 2, Part III, line 2)			-0-	00
15 Total deductions. Add lines 11, 12, 13, and 14			4,000	00

Tax	16	17	18	19	20a	20b	21
16 Taxable income. Subtract line 15 from line 10	(3,998)	00					
17 Income Tax due. Enter amount from tax table or check if from Form NOL-85A	-0-	00					
18 Net tax due Alabama. Check box if computing tax using Schedule NTC, otherwise enter amount from line 17	-0-	00					
19 Consumer Use Tax (see instructions). If you certify that no use tax is due, check box							
20 Alabama Election Campaign Fund. You may make a voluntary contribution to the following:							
a Alabama Democratic Party \$1 \$2 none					00		
b Alabama Republican Party \$1 \$2 none					00		
21 Total tax liability and voluntary contribution. Add lines 16, 19, 20a, and 20b	-0-	00					

Payments	22	23	24	25	26	27	28	29
22 Alabama income tax withheld (from column A, line 5a)	4,799	00						
23 2017 estimated tax payments/Automatic Extension Payment		00						
24 Amended Returns Only - Previous payments (see instructions)		00						
25 Refundable portion of Alabama Accountability Act of 2013 Credit		00						
26 Refundable portion of Adoption Credit		00						
27 Total payments. Add lines 22, 23, 24, 25, and 26						4,799	00	
28 Amended Returns Only - Previous refund (see instructions)							00	
29 Adjusted Total Payments. Subtract line 28 from line 27						4,799	00	

AMOUNT YOU OWE	30	31	32
30 If line 21 is larger than line 29, subtract line 29 from line 21, and enter AMOUNT YOU OWE. Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.)			00
31 Estimated tax penalty. Also include on line 30 (see instructions page 12)			00

OVERPAID	32	33	34
32 If line 29 is larger than line 21, subtract line 21 from line 29, and enter amount OVERPAID			4,799 00
33 Amount of line 32 to be applied to your 2018 estimated tax		00	

Donations	34	35
34 Total Donation Check-offs from Schedule DC, line 2		00

REFUND	35
35 REFUNDED TO YOU. (CAUTION: You must sign this return on the reverse side.) Subtract lines 33 and 34 from line 32	4,799 00



PART I

1	Alimony received	1	00
2	Business income or (loss) (attach Federal Schedule C or C-EZ) (see instructions)	2	00
3	Gain or (loss) from sale of Real Estate, Stocks, Bonds, etc. (attach Schedule D)	3	00
4a	Total IRA distributions	4a	00
4b	Taxable amount (see instructions)	4b	00
5a	Total pensions and annuities	5a	00
5b	Taxable amount (see instructions)	5b	00
6	Rents, royalties, partnerships, estates, trusts, etc. (attach Schedule E)	6	00
7	Farm income or (loss) (attach Federal Schedule F)	7	00
8	Other income (state nature and source - see instructions)	8	00
9	Total other income. Add lines 1 through 8. Enter here and also on page 1, line 7.	9	-0- 00

PART II

1a	Your IRA deduction	1a	00
b	Spouse's IRA deduction	1b	00
2	Payments to a Keogh retirement plan and self-employment SEP deduction	2	00
3	Penalty on early withdrawal of savings	3	00
4	Alimony paid. Recipient's last name _____ Social security no. _____	4	00
5	Adoption expenses	5	00
6	Moving Expenses (Attach Federal Form 3903) to City _____ State _____ ZIP _____	6	00
7	Self-employed health insurance deduction	7	00
8	Payments to Alabama College Counts 529 Fund or Alabama PACT Program	8	00
9	Health insurance deduction for small employer employee (see instructions)	9	00
10	Costs to retrofit or upgrade home to resist wind or flood damage	10	00
11	Deposits to a catastrophe savings account	11	00
12	Total adjustments. Add lines 1 through 11. Enter here and also on page 1, line 9.	12	-0- 00

PART III

Dependents

(1) First name	Last name	(2) Dependent's social security number	(3) Dependent's relationship to you	(4) Did you provide more than one-half dependent's support?

Do not include yourself or your spouse

(See page 17)

b Total number of dependents claimed above: _____

2 Amount allowed. (Multiply the total number of dependents claimed on line 1b by the amount from the dependent chart on page 10.)
Enter amount here and on page 1, line 14. _____ 2 00

PART IV

General Information

1 Residency Check only one box Full Year Part Year From _____ 2017 through _____ 2017.

2 Did you file an Alabama income tax return for the year 2016? Yes No If no, state reason _____

3 Give name and address of present employer(s). Yours _____ Birmingham, AL
Your Spouse's _____

4 Enter the Federal Adjusted Gross Income ● \$ 2.00 and Federal Taxable Income ● \$ 0.00 as reported on your 2017 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 _____	00
Source _____	Amount _____	00

Drivers License Info

DOB (mm/dd/yyyy) _____	Your state <u>AL</u> 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) _____

Sign Here In Black Ink

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.

You	Date <u>4/9/18</u>	Daytime telephone number _____	Your occupation <u>Unprivileged Worker</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 Self-Prepared Date _____

Check if self-employed

Firm's name (or yours if self-employed) and address _____ Daytime telephone no. () _____ E.I. No. _____

ZIP Code _____

WHERE TO FILE FORM 40

If you are not making a payment, mail your return to:
Alabama Department of Revenue
P.O. Box 154
Montgomery, AL 36135-0001

If you are making a payment, mail your return, Form 40V, and payment to:
Alabama Department of Revenue
P.O. Box 2401
Montgomery, AL 36140-0001

Mail only your 2016 Form 40 to one of the above addresses. Prior year returns, amended returns, and all other correspondence should be mailed to Alabama Department of Revenue, P.O. Box 327464, Montgomery, AL 36132-7464.

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.
▶ Go to www.irs.gov/Form4852 for the latest information.

1 Name(s) shown on return **2** Your social security number
 Scott Hannon

3 Address
 Birmingham, AL

4 Enter year in space provided and check one box. For the tax year ending December 31, 2017,
 I have been unable to obtain (or have received an incorrect) Form W-2 OR 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 **6** Employer's or payer's identification number (if known)
 Birmingham, AL

7 Form W-2. Enter wages, tips, other compensation, and taxes withheld.

a Wages, tips, and other compensation	-0-	f State income tax withheld	4,799.04
b Social security wages	-0-	(Name of state) <u>Alabama</u>	
c Medicare wages and tips	-0-	g Local income tax withheld	1,304.54
d Social security tips	-0-	(Name of locality) <u>Birmingham</u>	
e Federal income tax withheld	27,768.00	h Social security tax withheld	7,886.40
		i Medicare tax withheld	1,891.71

8 Form 1099-R. Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.

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	

9 How did you determine the amounts on lines 7 and 8 above?
 Line 7 (a), (b), and (c) were corrected as I did not receive any "wages" as defined in IRC Section 3401 (a) and Section 3121 (a) and others. Line 7 (e), (f), (g), (h), and (i) were derived from the erroneous W-2 sent to me by the "payer" on line 5.

10 Explain your efforts to obtain Form W-2, Form 1099-R, or Form W-2c, Corrected Wage and Tax Statement.
 None.

General Instructions

Section references are to the Internal Revenue Code.
Future developments. Information about any future developments affecting Form 4852 (such as legislation enacted after we release it) will be available at www.irs.gov/Form4852.
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 doesn't 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 your 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 the end of February, 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. You must also provide 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 will also send you a Form 4852. If you don't 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 your 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 you receive differs from the information reported on your return, you must amend your return by filing Form 1040X, Amended U.S. Individual Income Tax Return. You are responsible for filing your income tax return with accurate information regardless of whether you receive a Form W-2, Form W-2c, or Form 1099-R and regardless of whether the information on any forms received is correct.
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:

**SCHEDULE
W-2**
(FORM 40, 40A, or 40NR)



2017
ADOR

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

Form must be completed fully 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: **SCOTT Hannon**
PRIMARY SOCIAL SECURITY NO. _____ SPOUSE SOCIAL SECURITY NO. _____

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 Filer?	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		<input type="checkbox"/>	<input type="checkbox"/>	AL		4,799			
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.....					4,799			
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/S.....								
18	TOTAL WAGES AND TOTAL ALABAMA TAX WITHHELD FROM W-2S, 1099S, AND W-2GS. See instructions.....					4,799			