



Alabama Individual Income Tax Return  
RESIDENTS & PART-YEAR RESIDENTS

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

Your first name: ● Scott Initial: ● B Last name: ● Hannon

Spouse's first name: ● Initial: ● Last name: ●

Present home address (number and street or P.O. Box number): ● 3555 Grandview Pkwy, APT 313

City, town or post office: ● Birmingham State: ● AL ZIP code: ● 35243

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 ●

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). Complete Schedule HOF.

	A - Alabama tax withheld		B - Income	
	5a	5b	6	7
5a Alabama Income Tax Withheld (from Schedule W-2, line 18, column G)	5,009	00	0	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)			0	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			0	00
9 Total adjustments to income (from page 2, Part II, line 13)			0	00
10 Adjusted gross income. Subtract line 9 from line 8			0	00

	Box a or b MUST be checked			
	11	12		
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)	2,500	00		
12 Federal tax deduction (see instructions)	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

16 Taxable income. Subtract line 15 from line 10	16	-4,000	00
17 Income Tax due. Enter amount from tax table or check if from Form NOL-85A	17	0	00
18 Net tax due Alabama. Check box if computing tax using Schedule NTC, otherwise enter amount from line 17	18	0	00
19 Consumer Use Tax (see instructions). If you certify that no use tax is due, check box	19	0	00
20 Alabama Election Campaign Fund. You may make a voluntary contribution to the following:			
a Alabama Democratic Party \$1 \$2 none	20a	0	00
b Alabama Republican Party \$1 \$2 none	20b	0	00
21 Total tax liability and voluntary contribution. Add lines 18, 19, 20a, and 20b	21	0	00

22 Alabama income tax withheld (from column A, line 5a)	22	5,009	00
23 2018 estimated tax payments/Automatic Extension Payment	23	00	
24 Amended Returns Only - Previous payments (see instructions)	24	00	
25 Refundable Credits. Enter the amount from Schedule RC, line 4	25	00	
26 Total payments. Add lines 22, 23, 24, and 25	26	5,009	00
27 Amended Returns Only - Previous refund (see instructions)	27	00	
28 Adjusted Total Payments. Subtract line 27 from line 26	28	5,009	00

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	00	
30 Estimated tax penalty. Also include on line 29 (see instructions page 12)	30	00	

31 If line 28 is larger than line 21, subtract line 21 from line 28, and enter amount OVERPAID	31	5,009	00
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32 Amount of line 31 to be applied to your 2019 estimated tax	32	00	
33 Total Donation Check-offs from Schedule DC, line 2	33	00	

34 REFUNDED TO YOU. (CAUTION: You must sign this return on the reverse side.) Subtract lines 32 and 33 from line 31	34	5,009	00
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**PART I**

**Other Income**  
(See page 13)

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	19,231 00
5b	Taxable amount (see instructions)	5b	0 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	<b>Total other income.</b> Add lines 1 through 8. Enter here and also on page 1, line 7.	9	0 00

**PART II**

**Adjustments to Income**  
(See page 16)

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	Contributions to a health savings account	12	00
13	<b>Total adjustments.</b> Add lines 1 through 12. Enter here and also on page 1, line 9.	13	00

**PART III**

**Dependents**

1	Total number of dependents from Schedule DS, line 1b	1	00
2	<b>Amount allowed.</b> (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	00

**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 \_\_\_\_\_ Bham, AL  
Your Spouse's \_\_\_\_\_

4 Enter the Federal Adjusted Gross Income ● \$ 0 . 00 and Federal Taxable Income ● \$ 0 . 00 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 ● _____	00
Source ● _____	Amount ● _____	00

**Drivers License Info**

DOB (mm/dd/yyyy) ● \_\_\_\_\_ Your state ● \_\_\_\_\_ 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) ● \_\_\_\_\_

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.**

Keep a copy of this return for your records.

Yo: _____	Date 3/18/19	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  Preparer's SSN or PTIN ● \_\_\_\_\_

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 receiving a refund, Form 40, line 34, mail your return to: **Alabama Department of Revenue, P.O. Box 154, Montgomery, AL 36135-0001**

If you are making a payment, Form 40, line 29, mail your return to: **Alabama Department of Revenue, P.O. Box 2401, Montgomery, AL 36140-0001**

If you are not receiving a refund or making a payment, mail your return to: **Alabama Department of Revenue, P.O. Box 327469, Montgomery, AL 36132-7469**

Mail only your 2018 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.

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



**2018**  
ADOR

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.

Scott B Hannon

	A Employee's Social Security Number on W-2	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	•	•	4 • <input type="checkbox"/>	• <input type="checkbox"/>	•	•	• 5,009.00	• 0.00	• 0.00	• 0.00	
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	<b>TOTAL ALABAMA TAX WITHHELD FROM W-2s.</b> Total lines 1-15, Column G and enter the amount here. ....						• 5,009.00				
17	<b>ALABAMA TAX WITHHELD FROM 1099s AND W-2Gs.</b> 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 .....						• 0.00				
18	<b>TOTAL WAGES AND TOTAL ALABAMA TAX WITHHELD FROM W-2s, 1099s, AND W-2Gs.</b> See instructions.....						• 5,009.00	• 0.00	• 0.00	• 0.00	

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

**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 or 1040X.

▶ Go to [www.irs.gov/Form4852](http://www.irs.gov/Form4852) for the latest information.

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

**3** Address  
3555 Grandview Pkwy, #313 Birmingham, AL 35243

**4** Enter year in space provided and check one box. For the tax year ending December 31, 2018,  
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 TIN (if known)

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

<b>a</b> Wages, tips, and other compensation	<u>0</u>	<b>f</b> State income tax withheld	<u>5,009.09</u>
<b>b</b> Social security wages	<u>0</u>	(Name of state) <u>Alabama</u>	
<b>c</b> Medicare wages and tips	<u>0</u>	<b>g</b> Local income tax withheld	<u>1,304.64</u>
<b>d</b> Social security tips	<u>0</u>	(Name of locality) <u>Birmingham City</u>	
<b>e</b> Federal income tax withheld	<u>22,942.00</u>	<b>h</b> Social security tax withheld	<u>7,960.80</u>
		<b>i</b> Medicare tax withheld	<u>1,891.71</u>

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

<b>a</b> Gross distribution	<u>                    </u>	<b>f</b> Federal income tax withheld	<u>                    </u>
<b>b</b> Taxable amount	<u>                    </u>	<b>g</b> State income tax withheld	<u>                    </u>
<b>c</b> Taxable amount not determined	<input type="checkbox"/>	(Name of state)	<u>                    </u>
<b>d</b> Total distribution	<u>                    </u>	<b>h</b> Local income tax withheld	<u>                    </u>
<b>e</b> Capital gain (included in line 8b)	<u>                    </u>	(Name of locality)	<u>                    </u>
		<b>i</b> Employee contributions	<u>                    </u>
		<b>j</b> Distribution codes	<u>                    </u>

**9** How did you determine the amounts on lines 7 and 8 above?

Records provided by the Payer listed 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.** For the latest information about developments related to Form 4852, such as legislation enacted after it was published, go to [www.irs.gov/Form4852](http://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 don't receive the missing or corrected form from your employer or payer by the end of February, you may call the IRS at 800-829-1040 for assistance. You must provide your name, address (including ZIP code), phone number, social security number, and dates of employment. You also must 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 also will 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](http://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 indicates that the information reported on your original return is incorrect, 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:

**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.**

▶ Attach to Form 1040 or 1040X.

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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 TIN (if known)

**7 Form W-2.** Enter wages, tips, other compensation, and taxes withheld.  
a Wages, tips, and other compensation \_\_\_\_\_ f State income tax withheld \_\_\_\_\_  
b Social security wages \_\_\_\_\_ (Name of state) \_\_\_\_\_  
c Medicare wages and tips \_\_\_\_\_ g Local income tax withheld \_\_\_\_\_  
d Social security tips \_\_\_\_\_ (Name of locality) \_\_\_\_\_  
e Federal income tax withheld \_\_\_\_\_ h Social security tax withheld \_\_\_\_\_  
i Medicare tax withheld \_\_\_\_\_

**8 Form 1099-R.** Enter distributions from pensions, annuities, retirement or profit-sharing plans, IRAs, insurance contracts, etc.  
a Gross distribution . . . . . 19,231.01 f Federal income tax withheld . . . . . 3,846.20  
b Taxable amount . . . . . 0 g State income tax withheld . . . . . 0.00  
c Taxable amount not determined . . . . .  (Name of state) . . . . . Alabama  
d Total distribution . . . . .  h Local income tax withheld . . . . . \_\_\_\_\_  
e Capital gain (included in line 8b) . . . . . \_\_\_\_\_ (Name of locality) \_\_\_\_\_  
i Employee contributions . . . . . \_\_\_\_\_  
j Distribution codes . . . . . 1

**9** How did you determine the amounts on lines 7 and 8 above?

Records provided by the Payer listed 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

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