

FORM **40** Alabama **2023**

Individual Income Tax Return  
RESIDENTS & PART-YEAR RESIDENTS



For the year Jan. 1 - Dec. 31, 2023, or other tax year:

Beginning: ● Ending: ●

Your social security number ● Spouse's SSN if joint return ●  
 Check if primary is deceased Primary's deceased date (mm/dd/yyyy) ●  
 Check if spouse is deceased Spouse's deceased date (mm/dd/yyyy) ●

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

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

▶ CHECK BOX IF AMENDED RETURN ●

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

**Filing Status/ Exemptions** 1 ●  \$1,500 Single 3 ●  \$1,500 Married filing separate. Complete Spouse SSN ●  NRA  
 2 ●  \$3,000 Married filing joint 4 ●  \$3,000 Head of Family (with qualifying person). Complete Schedule HOF

	A - Alabama tax withheld	B - Income
<b>5a</b> Alabama Income Tax Withheld (from Schedule W-2, line 18, column G) . . . . .	5a ●	5b ●
<b>5b</b> Wages, salaries, tips, etc. (from Schedule W-2, line 18, column I plus J): . . . . .		
<b>6</b> Interest and dividend income (also attach Schedule B if over \$1,500) . . . . .		6 ●
<b>7</b> Other income (from page 2, Part I, line 8) . . . . .		7 ●
<b>8</b> Total income. Add amounts in the income column for line 5b through line 7 . . . . .		8 ●
<b>9</b> Total adjustments to income (from page 2, Part II, line 16) . . . . .		9 ●
<b>10</b> Adjusted gross income. Subtract line 9 from line 8 . . . . .		10 ●

**Deductions**

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  **Itemized Deductions** ● b  **Standard Deduction** . . . . . 11 ●

12 Federal tax deduction (see instructions)  
**DO NOT ENTER THE FEDERAL TAX WITHHELD FROM YOUR FORM W-2(S)** 12 ●

13 Personal exemption (from line 1, 2, 3, or 4). . . . . 13 ●

14 Dependent exemption (from page 2, Part III, line 2). . . . . 14 ●

15 Total deductions. Add lines 11, 12, 13, and 14 . . . . . 15 ●

**Tax**

16 Taxable income. Subtract line 15 from line 10. . . . . 16 ●

17 Income Tax due. Enter amount from tax table or check if from  Form NOL-85A . . . . . 17 ●

18 Net tax due Alabama. Check box if computing tax using Schedule OC ● , otherwise enter amount from line 17 . . . . . 18 ●

19 Additional taxes (from Schedule ATP, Part I, Line 3) . . . . . 19 ●

20 Alabama Election Campaign Fund. You may make a voluntary contribution to the following:  
 a Alabama Democratic Party  \$1  \$2  none . . . . . 20a ●  
 b Alabama Republican Party  \$1  \$2  none . . . . . 20b ●

21 Total tax liability and voluntary contribution. Add lines 18, 19, 20a, and 20b. . . . . 21 ●

**Payments**

22 Alabama income tax withheld (from column A, line 5a) . . . . . 22 ●

23 2023 estimated tax payments/Automatic Extension Payment . . . . . 23 ●

24 Amended Returns Only - Previous payments (see instructions) . . . . . 24 ●

25 Refundable Credits. Enter the amount from Schedule OC, Section F, line F4 . . . . . 25 ●

26 Payments from Schedule CP, Section B, Line 1 . . . . . 26 ●

27 Total payments. Add lines 22, 23, 24, 25, and 26 . . . . . 27 ●

28 Amended Returns Only - Previous refund (see instructions). . . . . 28 ●

29 Adjusted Total Payments. Subtract line 28 from line 27 . . . . . 29 ●

**AMOUNT YOU OWE**

30 If line 21 is larger than line 29, subtract line 29 from line 21, and add line 31 and enter **AMOUNT YOU OWE**.  
 Place payment, along with Form 40V, loose in the mailing envelope. (FORM 40V MUST ACCOMPANY PAYMENT.) 30 ●

31 Penalties (from Schedule ATP, Part II, line 3) (see instructions). . . . . 31 ●

**OVERPAID**

32 If line 29 is larger than line 21, subtract line 21 from line 29, and enter **AMOUNT OVERPAID** . . . . . 32 ●

33 Amount of line 32 to be applied to your **2024 estimated tax** . . . . . 33 ●

**Donations**

34 Total Donation Check-offs from Schedule DC, line 2 . . . . . 34 ●

**REFUND**

35 REFUNDED TO YOU. (CAUTION: You must sign this return on page 2.)  
 If line 32 is greater than zero, subtract lines 31, 33, and 34 from line 32 . . . . . 35 ●  
 For Direct Deposit, check here ●  and complete Part V, Page 2.