

1600110058

PA-40 2016 (08-16) (F1)
Pennsylvania Income Tax Return
PA Department of Revenue, Harrisburg, PA 17129

OFFICIAL USE ONLY

PLEASE PRINT IN BLACK INK. ENTER ONE LETTER OR NUMBER IN EACH BOX. FILL IN OVALS COMPLETELY.

Your Social Security Number Spouse's Social Security Number (even if filing separately)

Input boxes for Social Security Numbers

CAREFULLY PRINT YOUR SOCIAL SECURITY NUMBER(S) ABOVE

Last Name Suffix

Last Name: Jailbreak

Your First Name MI

Your First Name: Plotting

Spouse's First Name MI

Spouse's First Name

Spouse's Last Name - Only if different from Last Name above Suffix

Spouse's Last Name

First Line of Address

First Line of Address

Second Line of Address

Second Line of Address

City or Post Office State ZIP Code

City or Post Office, State, ZIP Code

Daytime Telephone Number School Code

Daytime Telephone Number, School Code

Extension. See the instructions.

Amended Return. See the instructions.

Residency Status. Fill in only one oval.

- R Pennsylvania Resident
N Nonresident
P Part-Year Resident from 2016 to 2016

Filing Status.

- S Single
J Married, Filing Jointly
M Married, Filing Separately
F Final Return. Indicate reason:

D Deceased

Taxpayer Date of death 2016

Spouse Date of death 2016

Farmers. Fill in this oval if at least two-thirds of your gross income is from farming.

Name of school district where you lived on 12/31/2016:

Your occupation Spouse's occupation

1a. Gross Compensation. Do not include exempt income, such as combat zone pay and qualifying retirement benefits. See the instructions. 1a.

1b. Unreimbursed Employee Business Expenses. 1b.

1c. Net Compensation. Subtract Line 1b from Line 1a. 1c.

2. Interest Income. Complete PA Schedule A if required. 2. 5,000.00

3. Dividend and Capital Gains Distributions Income. Complete PA Schedule B if required. 3. 20,000.00

4. Net Income or Loss from the Operation of a Business, Profession or Farm. LOSS 4.

5. Net Gain or Loss from the Sale, Exchange or Disposition of Property. LOSS 5. 12,000.00

6. Net Income or Loss from Rents, Royalties, Patents or Copyrights. LOSS 6.

7. Estate or Trust Income. Complete and submit PA Schedule J. 7.

8. Gambling and Lottery Winnings. Complete and submit PA Schedule T. 8.

9. Total PA Taxable Income. Add only the positive income amounts from Lines 1c, 2, 3, 4, 5, 6, 7 and 8. DO NOT ADD any losses reported on Lines 4, 5 or 6. 9.

10. Other Deductions. Enter the appropriate code for the type of deduction. See the instructions for additional information. 10.

11. Adjusted PA Taxable Income. Subtract Line 10 from Line 9. 11. 37,000.00

Side 1



EC OFFICIAL USE ONLY FC

Social Security Number (shown first)

[Empty box for Social Security Number]

Name(s)

12. PA Tax Liability. Multiply Line 11 by 3.07 percent (0.0307). 12. 1,136.00

13. Total PA Tax Withheld. See the instructions. 13.

ESTIMATED TAX PAID

14. Credit from your 2015 PA Income Tax return. 14.

15. 2016 Estimated Installment Payments. Fill in oval if including Form REV-459B. 15.

16. 2016 Extension Payment. 16.

17. Nonresident Tax Withheld from your PA Schedule(s) NRK-1. (Nonresidents only) 17.

18. Total Estimated Payments and Credits. Add Lines 14, 15, 16 and 17. 18. 0.00

19a. Filing Status: Unmarried or Separated Married Deceased 19b. Dependents, Part B, Line 2, PA Schedule SP.

20. Total Eligibility Income from Part C, Line 11, PA Schedule SP.

21. Tax Forgiveness Credit from Part D, Line 16, PA Schedule SP. 21. 0.00

22. Resident Credit. Submit your PA Schedule(s) G-L and/or RK-1. 22. 0.00

23. Total Other Credits. Submit your PA Schedule OC. 23.

24. TOTAL PAYMENTS and CREDITS. Add Lines 13, 18, 21, 22 and 23. 24.

25. USE TAX. Due on internet, mail order or out-of-state purchases. See the instructions. 25. 0.00

26. TAX DUE. If the total of Line 12 and Line 25 is more than Line 24, enter the difference here. 26. 1,136.00

27. Penalties and Interest. See the instructions for additional information. Fill in oval if including Form REV-1630/REV-1630A 27.

28. TOTAL PAYMENT DUE. See the instructions. 28. 1,136.00

29. OVERPAYMENT. If Line 24 is more than the total of Line 12, Line 25 and Line 27 enter the difference here. The total of Lines 30 through 36 must equal Line 29. 29.

30. Refund - Amount of Line 29 you want as a check mailed to you. REFUND 30.

31. Credit - Amount of Line 29 you want as a credit to your 2017 estimated account. 31.

DONATIONS

32. Refund donation line. Enter the organization code and donation amount. See the instructions. 32.

33. Refund donation line. Enter the organization code and donation amount. See the instructions. 33.

34. Refund donation line. Enter the organization code and donation amount. See the instructions. 34.

35. Refund donation line. Enter the organization code and donation amount. See the instructions. 35.

36. Refund donation line. Enter the organization code and donation amount. See the instructions. 36.

SIGNATURE(S). Under penalties of perjury, I (we) declare that I (we) have examined this return, including all accompanying schedules and statements, and to the best of my (our) belief, they are true, correct, and complete.

Signature and information fields: Your Signature, Date, E-File Opt Out, Preparer's PTIN, Spouse's Signature, Preparer's Name and Telephone Number, Firm FEIN.

PLEASE DO NOT CALL ABOUT YOUR REFUND UNTIL EIGHT WEEKS AFTER YOU FILE.



**PA SCHEDULE A**

Interest Income

PA-40 Schedule A  
(08-16) (FI)

**2016**

OFFICIAL USE ONLY

Name shown first on the PA-40 (if filing jointly)	Social Security Number (shown first)
Plotting for Jailbreak	

**CAUTION:** Federal and PA rules for taxable interest income are different. **Read the instructions.**

If your total PA-taxable interest income (taxpayer, spouse and/or joint) is equal to the amount reported on your federal return and you have no amounts for Lines 2 through 15 (not including subtotal Lines 4 and 10) of PA Schedule A, you must report your income on Line 2 of the PA-40, but you do not have to submit PA Schedule A. If there are any amounts (taxpayer, spouse and/or joint) for any of the Lines 2 through 15 (not including subtotal Lines 4 and 10) of the schedule, you must complete and submit PA Schedule A with your PA-40. A taxpayer and spouse must complete separate schedules to report their income if any amounts are reported on Lines 2 through 15 (not including subtotal Lines 4 and 10) of Schedule A. However, if all the income is earned on a joint basis, one schedule may be completed. Complete the oval to indicate whether the income included on the schedule is from the taxpayer, spouse or joint. If a separate PA Schedule A is prepared for a taxpayer and spouse, include only the taxpayer or spouse share of the income for each line.

**PA SCHEDULE A - PA-Taxable Interest Income** (See the instructions.)

Taxpayer  Spouse  Joint

1. Interest income reported on your federal return. <b>See instructions.</b>	1.	\$	<b>3,500.00</b>
2. Tax-exempt interest income reported on Line 8b of your federal return.	2.	\$	1,500.00
3. Other addition adjustments. <b>See instructions.</b> Description: _____	3.	\$	
4. Add Lines 1, 2 and 3.	4.	\$	5,000.00
5. Interest income from federal Schedule(s) K-1. <b>See instructions.</b>	5.	\$	
6. Interest income from direct obligations of the Commonwealth of Pennsylvania and/or its municipalities.	6.	\$	
7. Interest income from direct obligations of the U.S. government.	7.	\$	
8. Other reduction adjustments. <b>See instructions.</b> Description: _____	8.	\$	
9. Add Lines 5, 6, 7 and 8.	9.	\$	0.00
10. Subtract Line 9 from Line 4.	10.	\$	5,000.00
11. Distributions from Life Insurance, Annuity or Endowment Contracts included in federal taxable income.	11.	\$	
12. Distributions from Charitable Gift Annuities included in federal taxable income.	12.	\$	
13. Distributions from IRC Section 529 Qualified Tuition Programs for non-educational purposes.	13.	\$	
14. Distributions from Health/Medical Savings Accounts included in federal taxable income.	14.	\$	
15. Interest income from PA S corporations and partnership(s), reported on your PA Schedule(s) RK-1 or federal Schedule(s) K-1.	15.	\$	
<b>16. Total PA-Taxable Interest Income.</b> Add Lines 10 through 15. Enter on Line 2 of your PA-40.	16.	\$	<b>5,000.00</b>



**PA SCHEDULE B**

Dividend Income

PA-40 Schedule B  
(08-16) (FI)

**2016**

OFFICIAL USE ONLY

Name shown first on the PA-40 (if filing jointly)

Social Security Number (shown first)

**CAUTION:** Federal and PA rules for dividend income are different. **Read the instructions.**

If your total PA-taxable dividend and capital gains distributions income (taxpayer, spouse and/or joint) is equal to the amount reported on your federal return and does not include any amounts for Lines 2 through 10 (not including subtotal Line 6) of PA Schedule B, you must report your income on Line 3 of the PA-40, but you do not have to submit PA Schedule B. If there are any amounts (taxpayer, spouse and/or joint) for any of the Lines 2 through 10 (not including subtotal Line 6), you must complete and submit PA Schedule B with your PA-40. A taxpayer and spouse must complete separate schedules to report their income if any amounts are reported on Lines 2 through 10 (not including subtotal Line 6) of Schedule B. However, if all the income is earned on a joint basis, one schedule may be completed. Complete the oval to indicate whether the income included on the schedule is from the taxpayer, spouse or joint. If a separate PA Schedule B is prepared for a taxpayer and spouse, include only the taxpayer or spouse share of the income for each line.

**PA SCHEDULE B - PA-Taxable Dividend and Capital Gains Distributions Income** (See the instructions.)

Taxpayer  Spouse  Joint

1. Dividend income from Line 9a of your federal return. <b>See instructions.</b>	1.	\$	<b>20,000.00</b>
2. Dividend income from federal Schedule K-1(s). <b>See instructions.</b>	2.	\$	
3. Pennsylvania exempt-interest dividend income. <b>See instructions.</b>	3.	\$	
4. Other reduction adjustments. <b>See instructions.</b> Description: _____	4.	\$	
5. Add the amounts on Lines 2, 3 and 4.	5.	\$	20,000.00
6. Subtract Line 5 from Line 1.	6.	\$	
7. Total exempt-interest dividends. <b>See instructions.</b>	7.	\$	
8. Other addition adjustments. <b>See instructions.</b> Description: _____	8.	\$	
9. Capital Gains Distributions - <b>See instructions.</b>	9.	\$	
10. Dividend income from PA S corporation(s) and partnerships, reported on your PA Schedule(s) RK-1 or federal Schedule(s) K-1.	10.	\$	
11. <b>Total PA-Taxable Dividend Income.</b> Add Lines 6, 7, 8, 9 and 10. Enter on Line 3 of your PA-40.	11.	\$	

