

2016 Federal Form 1040 Information Smart Worksheet

Use this worksheet to compute taxable refund amount? ☐ Yes ☐ No
If no, skip this Smart Worksheet. Total refunds from Line 1 column (b) will be reported as income.

A Did you itemize deductions in 2016? ☐ Yes ☐ No

If no, none of your refund from 2016 is reportable as income. Do not complete the remainder of this worksheet.

B Enter the amount from your 2016 Schedule A, line 5, State and local tax _____

If none, enter zero, and do not complete the remainder of this worksheet.

C Which type of taxes were deducted on your 2016 Schedule A, line 5?

- 1** Income taxes (2016 Schedule A, box 5a, was checked) ☐
2 General sales taxes (2016 Schedule A, box 5b, was checked) ☐
3 Not applicable ☐

If general sales taxes were deducted, none of the refund from 2016 is reportable as income. Do not complete the remainder of this worksheet.

D Enter the deduction for general sales taxes that could have been taken in 2016 if you know that amount. _____

E What was your filing status for 2016?

- ☐ Single
☐ Married filing jointly
☐ Married filing separately
☐ Married filing separately and your spouse itemized deductions
☐ Head of household
☐ Qualifying widow(er)

F Could be claimed as a dependent by someone else in 2016? ☐ Yes ☐ No

G If yes, enter your earned income for 2016. _____

Enter the following amounts from your 2016 Form 1040:

H Line 38, Adjusted gross income _____

I Line 39a, Total number of boxes checked. _____

J Line 40, Itemized deductions or standard deduction _____

K Line 41, Adjusted gross income less itemized or standard deduction _____

L Line 42, Deduction for exemptions _____

M Line 43, Taxable income. Line K less line L (if less than zero, enter as negative). _____

N Line 44, Tax _____

O Line 45, Alternative minimum tax. _____

P Line 46, Excess advance premium tax credit repayment. _____

Q Line 47, Total tax before credits _____

R Line 56, Total tax after credits _____

If your adjusted gross income was greater than \$313,800 if filing status was married filing joint or qualifying widow(er), \$287,650 if filing status was head of household, \$261,500 if filing status was single, or \$156,900 if filing status was married filing separately, then also complete the below.

Enter the following amounts from your 2016 Schedule A, Itemized Deductions:

S Line 4, Medical and dental expenses _____

T Line 9, Taxes _____

U Line 14, Investment interest expense _____

V Line 15, Interest _____

W Line 19, Charity _____

X Line 20, Casualty and theft losses _____

Y Line 27, Job expenses and other deductions _____

Z Line 28, Other miscellaneous deductions _____

1 Any gambling losses included in line 28 _____

2 Any casualty or theft losses included in line 28 _____