

**2017 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 2017? . . . . .  Yes  No  
 If no, none of your refund from 2017 is reportable as income. Do not complete the remainder of this worksheet.

**B** Enter the amount from your 2017 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 2017 Schedule A, line 5?  
**1** Income taxes (2017 Schedule A, box 5a, was checked) . . . . .   
**2** General sales taxes (2017 Schedule A, box 5b, was checked) . . . . .   
**3** Not applicable . . . . .   
 If general sales taxes were deducted, none of the refund from 2017 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 2017 if you know that amount. . . . . \_\_\_\_\_

**E** What was your filing status for 2017?  
 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 2017? . . . . .  Yes  No

**G** If yes, enter your earned income for 2017. . . . . \_\_\_\_\_

**Enter the following amounts from your 2017 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 2017 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 . . . . . \_\_\_\_\_