

RI-1040 RHODE ISLAND RESIDENT INDIVIDUAL INCOME TAX RETURN



2005

| | | | |
|--|---|---------------------------------------|------------------------------------|
| NAME AND ADDRESS <div style="border: 1px solid black; border-radius: 15px; padding: 5px; width: fit-content;"> please print or type </div> | First Name _____ Initial _____ Last Name _____ | Your Social Security Number _____ | |
| | Spouse's First Name _____ Initial _____ Last Name _____ | Spouse's Social Security Number _____ | |
| | Present Home Address (Number and street, including apartment number or rural route) _____ | | Daytime Telephone Number () _____ |
| | City, Town or Post Office _____ State _____ Zip Code _____ | City or Town of Legal Residence _____ | |

ELECTORAL CONTRIBUTION If you want \$5.00 (\$10.00 if a joint return) to go to this fund, check here. (See instructions. This will not increase your tax or reduce your refund.) Yes No

If you wish the 1st \$2.00 (\$4.00 if a joint return) to be paid to a specific party, check the box and fill in the name of the political party. Otherwise, it will be paid to a nonpartisan general account. _____

FILING STATUS

Check only one box

1 Single 2 Married filing jointly 3 Married filing separately 4 Head of Household 5 Qualifying widow(er)

| | | | |
|--|---|------|--|
| INCOME, TAX AND CREDITS <div style="border: 1px solid black; padding: 5px;"> <p>Single \$5,000</p> <p>Married filing jointly or Qualifying widow(er) \$8,300</p> <p>Married filing separately \$4,150</p> <p>Head of household \$7,300</p> <p>However, people over 65, blind or can be claimed as a dependent, see the RI Deduction Schedules on page 4, check <input checked="" type="checkbox"/> this box and attach the schedule.</p> <p><input type="checkbox"/></p> </div> <div style="border: 1px solid black; border-radius: 15px; padding: 5px; width: fit-content; margin-top: 10px;"> Attach Forms W-2 and 1099 here. </div> | 1. Federal AGI (Adjusted Gross Income) - Federal Form 1040, line 37; 1040A, line 21; 1040EZ, line 4 or Telefile, line I. _____ | 1. | |
| | 2. Net modifications to Federal AGI (if no modifications, enter zero on this line) - Page 2, Schedule I, Line 25..... | 2. | |
| | 3. Modified Federal AGI - combine lines 1 and 2 (add net increases or subtract net decreases)..... | 3. | |
| | 4. Deductions - RI standard deduction (left margin) or amount from Federal Schedule A, line 28, whichever is greater. If you itemize and line 3 is over \$145,950 (\$72,975 if married filing separate) see itemized deduction schedule on page 4..... | 4. | |
| | 5. Subtract line 4 from line 3..... | 5. | |
| | 6. Exemptions - Enter federal exemptions in box then multiply by \$3,200 and enter result in 6. If line 3 is over \$109,475 or you provided housing to a person displaced by Hurricane Katrina, see worksheet on page I-4 for exemption amount..... <input type="checkbox"/> X \$3,200 = _____ | 6. | |
| | 7. RI TAXABLE INCOME - subtract line 6 from line 5..... | 7. | |
| | 8. A. RI income tax <input type="checkbox"/> RI Tax Table or Tax Computation Worksheet <input type="checkbox"/> RI Schedule CGW <input type="checkbox"/> RI Schedule D <input type="checkbox"/> RI Schedule J <input type="checkbox"/> RI-8615 | 8A. | |
| | B. Other RI taxes from page 3, RI Schedule OT, line 14..... | 8B. | |
| | 9. RI alternative minimum tax from RI-6251, line 14..... | 9. | |
| | 10. Total RI income tax - add lines 8A, 8B and 9..... | 10. | |
| | 11. A. RI percentage of allowable Federal credits from page 2, schedule II, line 34..... | 11A. | |
| | B. Other RI credits - indicate credit form number(s) _____ attach forms.. | 11B. | |
| | C. RI credit for income taxes paid to other states from page 2, schedule III, line 41..... | 11C. | |
| | 12. Total RI credits - add lines 11A, 11B and 11C..... | 12. | |
| | 13. RI income tax after credits - subtract line 12 from line 10 (not less than zero)..... | 13. | |
| | 14. RI use/sales tax (see page I-5 of instructions)..... | 14. | |
| 15. Total RI tax - add lines 13 and 14..... | 15. | | |
| 16. RI checkoff contributions from page 3, schedule IV, line 8 (contributions reduce your refund or increase your balance due) | 16. | | |
| 17. TOTAL RI TAX AND CHECKOFF CONTRIBUTIONS - add lines 15 and 16..... | 17. | | |

| | | | | |
|--|--|------|--|---|
| PAYMENTS AND PROPERTY TAX RELIEF CREDIT | 18. A. RI 2005 income tax withheld (please attach forms W-2, 1099, etc.)..... | 18A. | | Check <input checked="" type="checkbox"/> if extension is attached. <input type="checkbox"/> |
| | B. 2005 estimated tax payments and amount applied from 2004 return..... | 18B. | | |
| | C. Property tax relief credit from RI-1040H, line 15 or 22 (attach form RI-1040H)..... | 18C. | | |
| | D. RI earned income credit from page 2, RI Schedule EIC, line 50..... | 18D. | | |
| | E. Other payments..... | 18E. | | |
| | F. TOTAL PAYMENTS AND CREDITS - add lines 18A, 18B, 18C, 18D and 18E..... | 18F. | | |

| | | | |
|-------------------|---|-----|--|
| AMOUNT DUE | 19. If line 17 is LARGER than line 18F, Subtract line 18F from 17. YOU OWE THIS AMOUNT. Complete RI-1040V. Check <input checked="" type="checkbox"/> if RI-2210 or RI-2210A is attached - enter interest due \$ _____ or enter zero..... ☹️ | 19. | |
| | 20. If line 18F is LARGER than 17, subtract line 17 from 18F. THIS IS THE AMOUNT YOU OVERPAID 😊 | 20. | |
| REFUND | 21. Amount of overpayment to be refunded..... | 21. | |
| | 22. Amount of overpayment to be applied to 2006 estimated tax..... | 22. | |

RI SCHEDULE I RI MODIFICATIONS TO FEDERAL AGI

Table with 3 columns: Description, Line Number, and Amount. Rows include: 23. A. Modifications INCREASING Federal AGI... 23B. Other modifications INCREASING Federal AGI... 23C. Total modifications INCREASING Federal AGI... 24. A. Modifications DECREASING Federal AGI... 24B. Other modifications DECREASING Federal AGI... 24C. Total modifications DECREASING Federal AGI... 25. NET MODIFICATIONS TO FEDERAL AGI...

RI SCHEDULE II ALLOWABLE FEDERAL CREDITS

Table with 3 columns: Description, Line Number, and Amount. Rows include: 26. RI income tax from page 1, line 10... 27. Foreign tax credit from Federal Form 1040, line 47... 28. Credit for child and dependent care expenses... 29. Credit for the elderly or the disabled... 30. Federal mortgage interest credit... 31B. Other federal credits... 32. Total - add lines 27, 28, 29, 30 and 31B... 33. Tentative allowable federal credits... 34. MAXIMUM CREDIT...

RI SCHEDULE III CREDIT FOR INCOME TAXES PAID TO ANOTHER STATE

NOTE: Attach signed copy of the other state return.

Table with 3 columns: Description, Line Number, and Amount. Rows include: 35. RI income tax (page 1, line 10) less allowable federal credits... 36. Adjusted gross income from other state... 37. Modified federal AGI... 38. Divide line 36 by line 37... 39. Tentative credit... 40. Tax due and paid to other state... 41. MAXIMUM TAX CREDIT...

RI SCHEDULE EIC RHODE ISLAND EARNED INCOME CREDIT

Table with 3 columns: Description, Line Number, and Amount. Rows include: 42. Rhode Island income tax from RI-1040... 43. Federal earned income credit... 44. Rhode Island percentage (25%)... 45. Multiply line 43 by line 44... 46. Enter the SMALLER of line 42 or line 45... 47. Subtract line 46 from line 45... 48. Refundable percentage (10%)... 49. RI refundable earned income credit... 50. TOTAL RI EARNED INCOME CREDIT...

Under penalties of perjury, I declare that I have examined this return, and to the best of my knowledge and belief, it is true, correct and complete.

Table with 4 columns: Your Signature, Date, Spouse's Signature, Date.

If you do not need forms mailed to you next year, check box. [] May the division contact your preparer about this return? Yes []

Paid preparer's signature and address SSN, PTIN or EIN Telephone number ()

OTHER RI SCHEDULES








2005

Name(s) shown on Form RI-1040 or RI-1040NR

Your Social Security Number

RI SCHEDULE IV RI CHECKOFF ✓ CONTRIBUTIONS

NOTE: Contributions reduce your refund or increase your balance due.

| | | \$1.00 | \$5.00 | \$10.00 | Other | | |
|----|--|--------------------------|--------------------------|--------------------------|--------------------------|----------|--|
| 1. |  Drug program account..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 1. _____ |
| 2. |  Olympic Contribution Yes <input type="checkbox"/> \$1.00 Contribution (\$2.00 if a joint return) | | | | | | 2. _____ |
| 3. |  RI Organ Transplant Fund..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 3. _____ |
| 4. |  RI Council on the Arts..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 4. _____ |
| 5. |  RI Nongame Wildlife Fund..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 5. _____ |
| 6. |  Childhood Disease Victims' Fund..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 6. _____ |
| 7. |  RI Military Family Relief Fund..... | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | <input type="checkbox"/> | \$ _____ | 7. _____ |
| 8. | TOTAL CONTRIBUTIONS - add lines 1, 2, 3, 4, 5, 6 and 7 - Enter here and on RI-1040 or RI-1040NR, page 1, line 16..... | | | | | | 8. <table border="1" style="display: inline-table; width: 100px; height: 20px;"></table> |

RI SCHEDULE OT OTHER RHODE ISLAND TAXES

TAX ON LUMP-SUM DISTRIBUTIONS, PARENTS' ELECTION TO REPORT CHILD'S INTEREST AND DIVIDENDS, RECAPTURE OF FEDERAL TAX CREDITS AND OTHER MISCELLANEOUS FEDERAL INCOME TAXES.

| | | |
|-----|---|---|
| 9. | Tax on lump-sum distributions - Federal Form 4972, line 7 or line 30, whichever applies..... | 9. _____ |
| 10. | Parents' election to report child's interest and dividends from all Federal Form(s) 8814, line 9..... | 10. _____ |
| 11. | Amount of recapture of federal tax credits and other miscellaneous federal income taxes (see instructions)..... | 11. _____ |
| 12. | Total - add lines 9, 10 and 11..... | 12. _____ |
| 13. | Rhode Island percentage..... | 13. 25% |
| 14. | OTHER RHODE ISLAND TAXES - Multiply line 12 by line 13. Enter here and on RI-1040 or RI-1040NR, line 8B..... | 14. <table border="1" style="display: inline-table; width: 100px; height: 20px;"></table> |

RI-8615 TAX FOR CHILDREN UNDER AGE 14 WHO HAVE INVESTMENT INCOME

| | | |
|-----|---|---|
| 15. | Child's tax from Federal Form 8615, line 18..... | 15. _____ |
| 16. | Rhode Island percentage..... | 16. 25% |
| 17. | TAX - multiply line 15 by line 16 - Enter here and on RI-1040 or RI-1040NR, line 8A and check the RI-8615 box..... | 17. <table border="1" style="display: inline-table; width: 100px; height: 20px;"></table> |

RI Deduction Schedules for RI-1040 or RI-1040NR, line 4

2005

Name(s) shown on Form RI-1040 or RI-1040NR

Your Social Security Number

A. STANDARD DEDUCTION SCHEDULE FOR PEOPLE AGE 65 OR OLDER OR BLIND

DO NOT use this schedule if someone can claim you, or your spouse if filing jointly, as a dependent. Instead use RI Deduction Schedule B below.

Check if: **YOU** were 65 or older, (born before 01/02/1941), Blind, **SPOUSE** was 65 or older, (born before 01/02/1941), Blind

A. Enter the number of boxes checked above..... A. _____

| If your filing status is | AND the number on line A is | THEN your RI standard deduction is |
|--|----------------------------------|---|
| Single | 1 | \$6,250 |
| | 2 | 7,500 |
| Married filing jointly or Qualifying widow(er) | 1 | 9,300 |
| | 2 | 10,300 |
| | 3 | 11,300 |
| | 4 | 12,300 |
| Married filing separately | 1 | 5,150 |
| | 2 | 6,150 |
| | 3 | 7,150 |
| | 4 | 8,150 |
| Head of household | 1 | 8,550 |
| | 2 | 9,800 |

B. STANDARD DEDUCTION SCHEDULE FOR DEPENDENTS

Use this schedule **ONLY** if someone can claim you, or your spouse if filing jointly, as a dependent.

- Add \$250 to your **EARNED INCOME***. Enter the total here..... 1. _____
- Minimum standard deduction..... 2. 800
- Enter the **LARGER** of line 1 or line 2..... 3. _____
- Enter the amount shown below for your filing status.

| | | | |
|---|---------|---|----------------|
| Single..... | \$5,000 | } | 4. _____ |
| Married filing jointly or Qualifying widow(er)..... | 8,300 | | |
| Married filing separately..... | 4,150 | | |
| Head of household..... | 7,300 | | |
- STANDARD DEDUCTION**
 - Enter the **SMALLER** of line 3 or line 4. If under age 65 and not blind, **STOP HERE** and enter this amount on RI-1040 or RI-1040NR, line 4. **OTHERWISE**, go to line 5B..... 5A. _____
 - Check if: **YOU** were 65 or older, (born before 01/02/1941), Blind, **SPOUSE** was 65 or older, (born before 01/02/1941), Blind
If age 65 or older or blind, multiply the number of boxes checked by: \$1,250 if Single or Head of household; \$1,000 if Married filing jointly, Married filing separately or Qualifying widow(er)..... 5B. _____
 - Add lines 5A and 5B. Enter the total here and on RI-1040 or RI-1040NR, line 4..... 5C. _____

***EARNED INCOME** includes wages, salaries, tips, professional fees and other compensation received for personal services you performed. It also includes any amount received as a scholarship that you must include in your income. Generally, your earned income is the total of the amount(s) you reported on Federal Form 1040, lines 7, 12 and 18 minus line 27; Federal Form 1040A, line 7 or Federal Form 1040EZ, line 1.

C. ITEMIZED DEDUCTION SCHEDULE

(If you claimed a modification on RI-1040 or RI-1040NR, line 2; you must recalculate your Federal Schedule A before you complete this schedule)

- Add the amounts from Federal Form, Schedule A, lines 4, 9, 14, 18, 19, 26 and 27..... 1. _____
- Add the amounts from Federal Form, Schedule A, lines 4, 13 and 19 plus any gambling and casualty or theft losses included on line 27..... 2. _____
- Is the amount on line 2 less than the amount on line 1?
 No. **STOP HERE!** Your deduction is not limited. Enter the amount from line 1 above on RI-1040 or RI-1040NR, line 4.
 Yes. Subtract line 2 from line 1..... 3. _____
- Multiply line 3 above by 80% (.80)..... 4. _____
- Enter the amount from RI-1040 or RI-1040NR, line 3..... 5. _____
- Enter \$145,950 (\$72,975 if Married filing separately)..... 6. _____
- Is the amount on line 6 less than the amount on line 5?
 No. **STOP HERE!** Your deduction is not limited. Enter the amount from line 1 above on RI-1040 or RI-1040NR, line 4.
 Yes. Subtract line 6 from line 5..... 7. _____
- Multiply line 7 by 3% (.03)..... 8. _____
- Enter the **SMALLER** of line 4 or line 8..... 9. _____
- Total itemized deductions - Subtract line 9 from line 1 - Enter the result here and on RI-1040 or RI-1040NR, line 4..... 10. _____