

# Individual Income Tax Return 2001

North Carolina Department of Revenue

*Print in Black or Blue Ink Only*

For calendar year **2001**, or other tax year beginning (MM-DD) \_\_\_\_\_ - \_\_\_\_\_ **0 1** and ending (MM-DD-YY) \_\_\_\_\_ - \_\_\_\_\_

Your Social Security Number \_\_\_\_\_ Spouse's Social Security Number \_\_\_\_\_

**You must enter your social security number(s)**

Your First Name (USE CAPITAL LETTERS FOR YOUR NAME AND ADDRESS) \_\_\_\_\_ M.I. \_\_\_\_\_ Your Last Name \_\_\_\_\_

If a Joint Return, Spouse's First Name \_\_\_\_\_ M.I. \_\_\_\_\_ Spouse's Last Name \_\_\_\_\_

Address \_\_\_\_\_ County (Enter first five letters) \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_ Country (If not U.S.) \_\_\_\_\_

**Deceased Taxpayer Information**

If return is for a deceased taxpayer or deceased spouse, enter date of death.

Deceased taxpayer's date of death (MM-DD-YY) \_\_\_\_\_

Deceased spouse's date of death (MM-DD-YY) \_\_\_\_\_

**N.C. Political Parties Financing Fund**

Fill in appropriate circle if you want to designate \$1 to this fund; making a designation neither increases your tax nor reduces your refund.

You     Democratic     Republican     Unspecified

Your Spouse     Democratic     Republican     Unspecified

**Federal Adjusted Gross Income**

Enter federal adjusted gross income from your federal return (Form 1040, Line 33; Form 1040A, Line 19; Form 1040EZ, Line 4; or TeleFile Tax Record, Line I) \_\_\_\_\_

Fill in circle if negative   **.00**

**Residency Status**    Were you a resident of N.C. for the entire year of 2001?     Yes     No    *If no, complete Lines 46 through 50 on Page 4*

Was your spouse a resident for the entire year?     Yes     No

**Filing Status**    Same as federal. Fill in one circle only. If your spouse was a nonresident and had no North Carolina taxable income in 2001, see the Line Instructions for Lines 1 through 5. If you do not indicate your filing status by filling in one of the circles, any refund due will be delayed.

1.  Single

2.  Married Filing Jointly

3.  Married Filing Separately → (Enter your spouse's full name and Social Security Number) Name \_\_\_\_\_ SSN \_\_\_\_\_

4.  Head of Household

5.  Qualifying Widow(er) with Dependent Child (Year spouse died: \_\_\_\_\_)

Enter the Number of Exemptions claimed on your federal income tax return  
 \_\_\_\_\_

*Page references are to Form D-401, Individual Income Tax Instructions*

**6. Taxable Income from Your Federal Income Tax Return**  
 Form 1040, Line 39; Form 1040A, Line 25; Form 1040EZ, Line 6; or TeleFile Tax Record, Line K(1) Taxable Income (If zero, see the Line Instructions)     6. \_\_\_\_\_ **.00**

**7. Additions to Federal Taxable Income**  
 All taxpayers must complete Lines 29 through 38 on Page 3 and enter amount from Line 38     7. \_\_\_\_\_ **.00**

**8. Add Lines 6 and 7**     8. \_\_\_\_\_ **.00**

**9. Deductions from Federal Taxable Income**  
 If applicable, complete Lines 39 through 45 on Page 3 and enter amount from Line 45     9. \_\_\_\_\_ **.00**

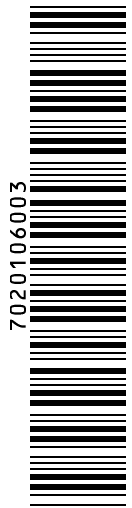
**10. a. Line 8 minus Line 9**     10a. \_\_\_\_\_ **.00**

**b. Part-year residents and nonresidents**  
 Complete Lines 46 through 50 on Page 4 and enter decimal amount from Line 50     10b. \_\_\_\_\_

**11. North Carolina Taxable Income**  
 Full-year residents enter the amount from Line 10a     11. \_\_\_\_\_ **.00**  
 Part-year residents and nonresidents multiply amount on Line 10a by 10b and enter result

If amount on Line 6, 8, 10a, 11, or 12 is negative, fill in circle.  
 Example:

*Enter Whole U.S. Dollars Only*



Enter Whole U.S. Dollars Only

**12. Enter amount from Line 11** (North Carolina Taxable Income) *Fill in circle if negative*  12. \_\_\_\_\_ .00

**13. North Carolina Income Tax**  
If the amount on Line 12 is less than \$68,000, use the **Tax Table** beginning on Page 15 of the instructions to determine your tax. If the amount on Line 12 is \$68,000 or more, use the **Tax Rate Schedule** on Page 23 to calculate your tax. 13. \_\_\_\_\_ .00

**14. Tax Credits** (From Form D-400TC, Part 4, Line 30) ▶ 14. \_\_\_\_\_ .00

**15. Subtract** Line 14 from Line 13 ▶ 15. \_\_\_\_\_ .00

**16. Consumer Use Tax** (See instructions on Page 6) ▶ 16. \_\_\_\_\_ .00

**17. Add** Lines 15 and 16 ▶ 17. \_\_\_\_\_ .00

**18. North Carolina Income Tax Withheld**  
(Staple original or copy of the original State wage and tax statement(s) in top left-hand corner of page 1 of the return)

▶ 18a. \_\_\_\_\_ .00

▶ 18b. \_\_\_\_\_ .00

**19. Other Tax Payments**

a. 2001 Estimated Tax ▶ 19a. \_\_\_\_\_ .00

b. Paid with Extension ▶ 19b. \_\_\_\_\_ .00

c. Partnership ▶ 19c. \_\_\_\_\_ .00

d. S Corporation ▶ 19d. \_\_\_\_\_ .00

**20. Add** Lines 18a through 19d ▶ 20. \_\_\_\_\_ .00

**21. a.** If Line 17 is more than Line 20, subtract and enter the result ▶ 21a. \_\_\_\_\_ .00

**b.** Penalty for underpayment of estimated income tax ▶ 21b. \_\_\_\_\_ .00  
(See instructions and enter letter in box, if applicable) **Penalty Exception**

**c.** Other penalties and interest (See instructions) ▶ 21c. \_\_\_\_\_ .00

**22. Add** Lines 21a, 21b, and 21c and enter the total - **Pay This Amount** ▶ 22. \$ \_\_\_\_\_ .00

**23.** If Line 17 is less than Line 20, subtract and enter the result ▶ 23. \_\_\_\_\_ .00

**24.** Amount of Line 23 to be applied to **2002 Estimated Income Tax** ▶ 24. \_\_\_\_\_ .00

**25.** Contribution to the **N.C. Nongame and Endangered Wildlife Fund** ▶ 25. \_\_\_\_\_ .00

**26.** Contribution to the **N.C. Candidates Financing Fund** ▶ 26. \_\_\_\_\_ .00

**27. Add** Lines 24, 25, and 26 ▶ 27. \_\_\_\_\_ .00

**28. Subtract** Line 27 from Line 23 and enter the **Amount To Be Refunded** ▶ 28. \_\_\_\_\_ .00

Be sure to sign and date your return on Page 4.

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**Additions to Federal Taxable Income** (See Line Instructions beginning on Page 8.)

29. Enter the itemized deductions or the standard deduction from your federal return

- Form 1040, Line 36
- Form 1040A, Line 22
- Form 1040EZ SINGLE filers - enter \$4,550 **OR** the amount from Line 5 of Form 1040EZ, **whichever is less**
- Form 1040EZ MARRIED FILING JOINTLY filers - enter \$7,600 **OR** the amount from Line 5 of Form 1040EZ, **whichever is less**
- TeleFile Tax Record filers - enter standard deduction from Line J(1) of TeleFile Tax Record

Enter Whole U.S. Dollars Only

▶ 29. \_\_\_\_\_ .00

30. Enter your standard deduction from the applicable chart or worksheet on Page 8

▶ 30. \_\_\_\_\_ .00

31. **Subtract** Line 30 from Line 29 and enter the result here, but not less than zero  
**IMPORTANT: If you claimed the standard deduction on your federal return, skip Line 32 and enter on Line 33 the amount entered on Line 31**

▶ 31. \_\_\_\_\_ .00

32. If you itemized your deductions on your federal return, Form 1040, enter the state and local income taxes from Line 5 and any foreign income taxes included on Line 8 of Federal Schedule A. **IMPORTANT: If you were required to complete the Itemized Deductions Worksheet in the instructions for Federal Form 1040, see Page 9**

▶ 32. \_\_\_\_\_ .00

33. Compare Line 31 with Line 32 and enter whichever is less

▶ 33. \_\_\_\_\_ .00

34. Personal exemption adjustment (Complete the **Personal Exemption Adjustment Worksheet** on Page 9 and enter the result)

▶ 34. \_\_\_\_\_ .00

35. Interest income from obligations of states other than North Carolina

▶ 35. \_\_\_\_\_ .00

36. Lump-sum distributions from a pension or profit sharing plan

▶ 36. \_\_\_\_\_ .00

37. Other additions to federal taxable income (Attach explanation or schedule)

▶ 37. \_\_\_\_\_ .00

38. **Total additions** - Add Lines 33 through 37 (Enter the total here and on Line 7)

▶ 38. \_\_\_\_\_ .00

**Deductions from Federal Taxable Income** (See Line Instructions beginning on Page 10.)

39. State or local income tax refund if included on Line 10 of Federal Form 1040

▶ 39. \_\_\_\_\_ .00

40. Interest income from obligations of the United States, United States' possessions, or the State of North Carolina

▶ 40. \_\_\_\_\_ .00

41. Taxable portion of Social Security and Railroad Retirement Benefits included on your federal return

▶ 41. \_\_\_\_\_ .00

42. Retirement benefits received by vested N.C. State government, N.C. local government, or federal government retirees (**Bailey settlement**)

▶ 42. \_\_\_\_\_ .00

43. If you have retirement benefits not reported on Lines 41 or 42, complete the **Retirement Benefits Worksheet** on Page 11 and enter the result here

▶ 43. \_\_\_\_\_ .00

44. Other deductions from federal taxable income (Attach explanation or schedule)

▶ 44. \_\_\_\_\_ .00

45. **Total deductions** - Add Lines 39 through 44 (Enter the total here and on Line 9)

▶ 45. \_\_\_\_\_ .00

This page must be filed with Pages 1 and 2 of this form.

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Computation of North Carolina Taxable Income for Part-Year Residents and Nonresidents

(See Line Instructions beginning on Page 11.)

	You	Your Spouse
If you were a part-year resident of North Carolina, enter the dates of residency in the boxes. →	Date residency began (MM-DD-YY)	
	Date residency ended (MM-DD-YY)	

If amount on Line 46, 47, 48, or 49 is negative, fill in circle. Example:  Enter Whole U.S. Dollars Only

46. Total income while you were a <b>Resident</b> of North Carolina <i>(If a loss, enter amount and fill in circle to indicate the amount is negative)</i>	▶ 46. <input type="radio"/>	<input type="text"/> .00
47. Total income from <b>North Carolina</b> sources while you were a <b>Nonresident</b> of North Carolina <i>(If a loss, enter amount and fill in circle to indicate the amount is negative)</i>	▶ 47. <input type="radio"/>	<input type="text"/> .00
48. Add Lines 46 and 47	48. <input type="radio"/>	<input type="text"/> .00
49. Total income from all sources Form 1040, Line 22; 1040A, Line 15; 1040EZ, Line 4; or TeleFile Tax Record, Line I <i>(If you entered additions or deductions on Lines 7 or 9, see the instructions on Page 11)</i>	▶ 49. <input type="radio"/>	<input type="text"/> .00
50. Divide Line 48 by Line 49 <i>(Enter the result as a decimal amount here and on Line 10b; round to two decimal places)</i>	50.	<input type="text"/>

I certify that, to the best of my knowledge, this return is accurate and complete.	Fill in circle if return was completed by paid preparer. → <input type="radio"/>
<b>Sign Here</b> Your Signature _____ Date _____	If prepared by a person other than taxpayer, this certification is based on all information of which the preparer has any knowledge.
Spouse's Signature <i>(If filing joint return, both must sign.)</i> _____ Date _____	Paid Preparer's Signature _____ Date _____
( ) _____ Daytime Telephone Number <i>(Include area code.)</i>	▶ ( ) _____ Preparer's FEIN, SSN, or PTIN Preparer's Telephone Number

<b>If REFUND mail return to:</b> N.C. DEPT. OF REVENUE P.O. BOX R RALEIGH, NC 27634-0001	<b>If you ARE NOT due a refund, mail return, any payment, and D-400V to:</b>	N.C. DEPT. OF REVENUE P.O. BOX 25000 RALEIGH, NC 27640-0640
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**Payment Voucher** - If you are sending in a payment and you received a preaddressed income tax booklet, use the payment voucher (**Form D-400V**) included on the inside flap of the front cover of the booklet. Complete the voucher and enclose it with your return and payment in the envelope provided. Please do not staple, tape, paper clip, or otherwise attach your payment or voucher to your return or to each other.

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