

# 1999 INDIVIDUAL INCOME TAX WORKSHEETS

ATTACH THIS FORM TO YOUR RETURN



## Worksheet IV - Pension and Annuity Exclusion

Column A      Column B

**Note: Short Form filers use column A only.**

1. Enter your federal adjusted gross income from line 20 of Form 2. . . . . 1. \_\_\_\_\_
2. Phase-out limitation. . . . . 2. 30,000      30,000
3. If line 1 is smaller than line 2, enter on Form 2 line 29: the smaller of (a) pension and annuity income or (b) \$3,600 for each person who has pension and annuity income. **Stop Here**, you do not need to complete the remainder of this worksheet. If line 1 is larger than line 2, subtract line 2 from line 1 and enter the result. . . . . 3. \_\_\_\_\_
4. **Fill Out Only One.**  
If your filing status is:
  - a. **Single or Joint and** only one has pension and annuity income; enter your taxable pension and annuity income or \$3,600, whichever is smaller. . . . . 4a. \_\_\_\_\_
  - b. **Married Filing Separately**; enter 1) each spouse's taxable pension and annuity income, or 2) \$3,600 in columns A and B whichever is smaller. . . . . 4b. \_\_\_\_\_
  - c. **Joint** and both spouses have pension and annuity incomes: **1st**, enter each spouse's taxable pension and annuity income or \$3,600, whichever is smaller, on the following lines: (His) \_\_\_\_\_ (Hers) \_\_\_\_\_; **2nd**, enter the total of the two lines. . . . . 4c. \_\_\_\_\_
5. Multiply the amount on line 3 times two and enter the result. . . . . 5. \_\_\_\_\_
6. Pension and annuity exclusion. Subtract line 5 from line 4a, 4b or 4c, whichever applies to you. If the result is zero or negative, you are not eligible for an exclusion. If the number is positive, this is your exclusion. Transfer this number to line 29 on Form 2. . . . . 6. \_\_\_\_\_

## Worksheet V - Standard Deduction

Column A      Column B

**Note: Short Form filers use column A only.**

1. Enter amount from line 37 of Form 2. (Line 21 of Form 2S) . . . . . 1. \_\_\_\_\_
2. Enter 20% (.20) of line 1. . . . . 2. \_\_\_\_\_
3. Enter the amount from below that corresponds to your filing status:
 

Joint or Head of Household  
(filing status 2 or 6): \$6,040

Single or separate (filing  
status 1,3,4, or 5): \$3,020 . . . . . 3. \_\_\_\_\_
4. Enter the amount from line 2 or line 3, whichever is **smaller**. . . . . 4. \_\_\_\_\_
5. Enter the amount from below that corresponds to your filing status:
 

Joint or Head of Household (filing status 2 or 6): \$2,680

Single or separate (filing status 1,3,4 or 5): \$1,340 . . . . . 5. \_\_\_\_\_
6. Enter the amount from line 4 or line 5, whichever is **larger**. This is your standard deduction. Transfer this amount to line 38, Form 2. (line 22a, Form 2S) . . . . . 6. \_\_\_\_\_

If Taxable Income is:

### TAX TABLE

If Taxable Income is:

Over	But not over	Multiply by	and Subtract = Tax	Over	But not over	Multiply by	and Subtract = Tax
\$ 0	\$ 2,000	X 2 %	\$ 0	\$16,100	\$20,100	X 7 %	\$ 422
\$ 2,000	\$ 4,000	X 3 %	\$ 20	\$20,100	\$28,200	X 8 %	\$ 623
\$ 4,000	\$ 8,000	X 4 %	\$ 60	\$28,200	\$40,200	X 9 %	\$ 905
\$ 8,000	\$12,100	X 5 %	\$ 140	\$40,200	\$70,400	X 10 %	\$1,307
\$12,100	\$16,100	X 6 %	\$ 261	\$70,400		X 11 %	\$2,011

Example = taxable income \$2,400 x 3% (.03) = \$72 subtract \$20 = \$52 tax