



2001

MAINE INDIVIDUAL INCOME TAX
1040S-ME RESIDENT SHORT FORM



010223000

(DO NOT STAPLE OR TAPE FORMS TO YOUR RETURN). ENCLOSE CHECK OR MONEY ORDER AND W-2 OR 1099 FORMS IN THE ENVELOPE WITH YOUR RETURN.

STEP 1

Print Neatly in Blue or Black Ink, Using Upper Case Letters

DO NOT USE RED INK

NOTE: If either spouse is deceased, enter the date of death on the back of this page in the spaces provided above the signature area.

Form fields for personal information: Your First Name, Initial, Your Social Security Number, Your Last Name, Spouse's Social Security Number, Spouse's First Name, Initial, Home Phone Number, Spouse's Last Name, Work Phone Number, Home Mailing Address, City/Town, State, ZIP Code.

1 Maine Clean Election Fund - see instructions on page 6. NOTE: Checking the box will not increase your tax or reduce your refund. YES NO. Do you want \$3 to go to this fund? If a joint return, does your spouse want \$3 to go to this fund?

2 Check here if you were engaged in Commercial Farming or Fishing during 2001 (see instructions).

STEP 2

Indicate Your Filing Status

FILING STATUS (check one)
3 Single
4 Married filing joint return (Even if only one had income)
5 Married filing separate return (Enter spouse's social security number and full name above)
6 Head of household (With qualifying person)
7 Qualifying widow(er) with dependent children (Year spouse died:)

8 CHECK IF:
You were Spouse was
65 or over 8a 8c
Blind 8b 8d

STEP 3

Enter Your Exemptions

9 Total number of EXEMPTIONS claimed on your federal return 9

STEP 4

Calculate Your Taxable Income

10 FEDERAL ADJUSTED GROSS INCOME (From your federal Form 1040EZ, line 4; or 1040A, line 19; or 1040, line 33; or telefile worksheet, line I. If negative, enter a minus sign in the box to the left of the number.) 10
11 MAINE STATE RETIREMENT CONTRIBUTIONS 11
12 U.S. GOVERNMENT BOND INTEREST included in your federal adjusted gross income 12
13 SOCIAL SECURITY AND RAILROAD RETIREMENT BENEFITS included in your federal adjusted gross income 13
14 PENSION INCOME DEDUCTION (See instructions and worksheet on page 14) 14
15 MAINE ADJUSTED GROSS INCOME (Add lines 10 and 11, subtract lines 12, 13, and 14. If negative, enter a minus sign in the box to the left of the number.) 15
16 STANDARD DEDUCTION (See instructions on page 7) 16
17 EXEMPTION (Multiply number of exemptions on line 9 by \$2,850) 17
18 TAXABLE INCOME (Line 15 minus lines 16 and 17. If negative, enter a minus sign in the box to the left of the number.) 18
19 INCOME TAX (Find the tax for the amount on line 18 in the tax table on pages 15-19) (If line 18 is negative, enter zero.) 19



STEP 5

Calculate Your Tax and Voluntary Contributions

20 INCOME TAX (From line 19, page 1) 20 _____ ' _____ . _____
21 LOW-INCOME CREDIT If the amount on line 18 is \$2,000 or less and neither you nor your spouse (if married) are claimed on another person's return, enter the amount on line 20 here 21 _____ . _____
NOTE: You are not required to file a return if you qualify for this credit. (See instructions)
22 EARNED INCOME TAX CREDIT (EIC) Your federal EIC \$ _____ x .05. Enter result here 22 _____ ' _____ . _____
23 NET INCOME TAX Line 20 minus lines 21 and 22 (If less than zero, enter zero) 23 _____ ' _____ . _____
24 MAINE INCOME TAX WITHHELD (Enclose W-2 and 1099 forms) 24 _____ ' _____ . _____
(DO NOT include estimated tax payments)
25 OVERPAYMENT If line 24 is larger than line 23, subtract line 23 from line 24. Enter result here 25 _____ ' _____ . _____
26 UNDERPAYMENT If line 23 is larger than line 24, subtract line 24 from line 23. Enter result here 26 _____ ' _____ . _____
27 TOTAL VOLUNTARY CONTRIBUTIONS AND PARK PASS PURCHASES (From Schedule CP, line 10) . 27 _____ ' _____ . _____
28 USE TAX (SALES TAX) (See instructions) 28 _____ ' _____ . _____

STEP 6

Calculate Your Refund or Amount Due

29 REFUND If line 25 is greater than the total of lines 27 and 28, subtract lines 27 and 28 from line 25. ☺ Enter result here. Otherwise go to line 31 below. 29 _____ ' _____ . _____
IF YOU WOULD LIKE YOUR REFUND DEPOSITED DIRECTLY TO YOUR BANK ACCOUNT OR TO YOUR NEXTGEN COLLEGE INVESTING PLAN® ACCOUNT, read the instructions on page 8, and fill out the information below. NOTE: Completing the information below authorizes Maine Revenue Services to disclose your social security number listed on the front of this form to your financial institution for the sole purpose of depositing your income tax refund directly into your bank account or NextGen College Investing Plan® Account.
30 Direct Deposit
30a Routing Number _____ 30c Account type Checking Savings NextGen
30b Account Number _____
31 AMOUNT DUE Line 26 plus lines 27 and 28. (OR If total of lines 27 and 28 is greater than line 25, subtract line 25 from the total of lines 27 and 28). (If \$1,000 or more see instructions.) Enter result here. 31 _____ ' _____ . _____
ENCLOSE CHECK payable to: Treasurer, State of Maine. Include your social security number on your check to receive proper credit on your account. DO NOT SEND CASH.

FOR MAINE RESIDENTS ONLY: If you would like to receive a 2002 Maine Residents Property Tax and Rent Refund Application Check here:
The Maine Residents Property Tax and Rent Refund program is a property tax relief program for qualified homeowners or renters who live in Maine. The 2001 program was generally available to Maine residents with household income less than \$43,600 for multi-member households or less than \$28,100 for single-member households. Also, your property taxes must have been greater than 4% of your income or your rent must have been greater than 22% of your income. Under current law, you may apply for this refund anytime from August 1, 2002 through December 31, 2002. THE APPLICATION WILL BE MAILED TO YOU IN AUGUST 2002 unless the income on line 15 is greater than the income limits for the program.



To reduce state printing and postage costs, if you have your return done by a tax preparer and do not need Maine income tax forms and instructions mailed to you next year, check box at right

If taxpayer is deceased, (Month) (Day) (Year) If spouse is deceased, (Month) (Day) (Year)
enter date of death enter date of death

Under penalties of perjury, I declare that I have examined this return and accompanying schedules and statements, and to the best of my knowledge and belief, they are true, correct, and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

Sign Here
Keep a copy of this return for your records
YOUR SIGNATURE _____ DATE _____ YOUR OCCUPATION _____
SPOUSE'S SIGNATURE _____ DATE _____ SPOUSE'S OCCUPATION _____
If necessary to process your return, may Maine Revenue Services discuss the contents of the return with the preparer shown below? Yes No
Paid Preparer's use only
PREPARER'S SIGNATURE _____ DATE _____ PREPARER'S PHONE NUMBER _____
FIRM'S NAME (or yours, if self-employed) _____ PREPARER'S EIN or PTIN _____

If requesting a REFUND, mail to: Maine Revenue Services, P.O. Box 9110, Augusta, ME 04332-9110
If NOT requesting a refund, mail to: Maine Revenue Services, P.O. Box 1066, Augusta, ME 04332-1066
DO NOT SEND PHOTOCOPIES OF RETURNS

OFFICE USE ONLY: CK \$ _____ PP IS