

For more information or to schedule an interview contact:
 Denise Sposato, PR Manager, US Tax (816) 932-4909
 Nancy Wagoner, PR Specialist, US Tax (816) 932-4823

“Choosing the right tax form can sometimes be confusing and challenging, especially in a year with many new tax law changes. We’ve developed a reference chart for taxpayers, comparing the requirements for using a 1040 vs. 1040A vs. 1040EZ to eliminate some of the guesswork.”

— Jackie Perlman, CPA, Senior Tax Research Analyst

FINDING THE RIGHT TAX FORM FOR YOU

IMPORTANT NOTE: Nonresident aliens may need to file Form 1040NR or 1040NR-EZ. For more information on filing requirements for nonresidents and part-year residents, see IRS Publication 519, U.S. Tax Guide for Aliens, or see your tax professional.

TAX RETURN ITEM	1040	1040A	1040EZ
Filing status	<ul style="list-style-type: none"> Any filing status. 	<ul style="list-style-type: none"> Any filing status. 	<ul style="list-style-type: none"> Single. Married filing jointly.
Dependents	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> No.
Income	<ul style="list-style-type: none"> All income. 	<ul style="list-style-type: none"> All 1040EZ categories, plus. Interest and dividends. Capital gain distributions. IRA and retirement plan distributions. Social security. 	<ul style="list-style-type: none"> Wages, salaries, tips. Taxable interest of \$400 or less. Unemployment compensation. Qualified tuition program (QTP) distributions. Alaska Permanent Fund dividends.
Foreign earned income exclusion	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> No. 	<ul style="list-style-type: none"> No.
Adjustments to income	<ul style="list-style-type: none"> All adjustments. 	<ul style="list-style-type: none"> IRA deduction. Student loan interest deduction. 	<ul style="list-style-type: none"> None allowed.
Deductions	<ul style="list-style-type: none"> Standard or itemized deductions. 	<ul style="list-style-type: none"> Standard deduction only. 	<ul style="list-style-type: none"> Standard deduction only. If age 65 or older and/or blind, use Form 1040A or Form 1040.
Taxable income	<ul style="list-style-type: none"> No limitation. 	<ul style="list-style-type: none"> Under \$50,000. 	<ul style="list-style-type: none"> Under \$50,000.
Credits	<ul style="list-style-type: none"> All credits. 	<ul style="list-style-type: none"> Earned income credit. Child and dependent care expense credit. Child tax credit. Education credits. Adoption credit. Credit for elderly or disabled. 	<ul style="list-style-type: none"> Earned income credit.
Household employment taxes	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> No. 	<ul style="list-style-type: none"> No.
Alternative minimum tax	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> No.
Other items of income, deductions, and credits	<ul style="list-style-type: none"> Yes. 	<ul style="list-style-type: none"> No. Any items not listed above require Form 1040. 	<ul style="list-style-type: none"> No. Any items not listed above require Form 1040.