**RI-1040 Rhode Island Resident Individual Income Tax Return 2001**

### Name and Address

<table>
<thead>
<tr>
<th>First Name</th>
<th>Initial</th>
<th>Last Name</th>
<th>Your Social Security Number</th>
</tr>
</thead>
</table>

<table>
<thead>
<tr>
<th>Spouse's First Name</th>
<th>Initial</th>
<th>Last Name</th>
<th>Spouse's Social Security Number</th>
</tr>
</thead>
</table>

### Present Home Address (Number and Street, Including Apartment No. or Rural Route)

<table>
<thead>
<tr>
<th>City, Town or Post Office</th>
<th>State</th>
<th>Zip Code</th>
<th>City or Town of Legal Residence</th>
</tr>
</thead>
</table>

### Electoral Contribution

$5.00 ($10.00 if a joint return) See instructions. NOTE: this will not increase your tax or reduce your refund. Check one.

<table>
<thead>
<tr>
<th>Yes</th>
<th>No</th>
</tr>
</thead>
</table>

If you wish the 1st $2.00 ($4.00 if a joint return) to be paid to a specific party, check the 1st box and fill in the name of the political party. If you wish it to be paid to a nonpartisan general account, check 2nd box.

### Filing Status

Check only one box: 1 Single 2 Married filing joint return (even if only one had income) 3 Married filing separate return 4 Head of Household (with qualifying person) 5 Qualifying widow(er) with dependent child.

### Income

1. Federal AGI (Adjusted Gross Income) - Federal Form 1040, line 33; 1040A, line 19; 1040EZ, line 4; Telefile item I

2. Net modifications to Federal AGI (If no modifications, enter zero on this line) - Page 2, Schedule I, Line 25

3. Modified Federal AGI - combine lines 1 and 2 - (add net increases or subtract net decreases)

4. Federal deductions - Federal Form 1040, line 36; 1040A, line 22; 1040EZ, line 5; Telefile item J (first box)

5. Subtract line 4 from line 3

6. Federal exemption amount - Federal Form 1040, line 38; 1040A, line 24; 1040EZ enter zero; Telefile item J (second box)

7. RI taxable income - subtract line 6 from line 5

### Tax and Credits

8. RI income tax - Check only one box: RI Tax Table or RI Tax Rate Schedules RI Schedule D RI Schedule J

9. RI alternative minimum tax - Form RI-6251, page 4, line 10

10. Total RI income tax - add lines 8 and 9

11. A. RI percentage of allowable Federal credits - from page 2, schedule II, line 34

12. Total RI credits - add lines 11A, 11B, and 11C

13. RI income tax after credits - subtract line 12 from line 10 (not less than zero)

14. RI Use/Sales tax - page 4, schedule T-205P, line 31. (see instructions)

15. Total RI tax - add lines 13 and 14

16. RI checkoff contributions - page 2, schedule IV, line 42G (contributions will reduce your refund or increase your balance due)

17. Total RI tax and checkoff contributions - add lines 15 and 16

### Payments and Property Tax Relief Credit

18. A. RI 2001 income tax withheld (Please attach forms - W-2, 1099, etc.)

B. 2001 estimated tax payments and amount applied from 2000 return

C. Property tax relief credit - from RI-1040H, line 15 or 22 (attach form RI-1040H)

D. Other payments

19. Check if extension is attached

### Amount Due and Refund

19. If line 17 is larger than line 18E, SUBTRACT line 18E from line 17. This is the amount you owe. Complete RI-1040V.

20. If line 18E is larger than line 17, subtract line 17 from 18E. This is the amount you overpaid.

**Mail refund returns to - RI Division of Taxation One Capitol Hill Providence, RI 02908-5806**

21. Amount of overpayment to be refunded

22. Amount of overpayment to be applied to 2002 estimated tax

**RETURN MUST BE SIGNED - SIGNATURE LINE IS LOCATED ON PAGE 2**
SCHEDULE I  RI MODIFICATIONS TO FEDERAL AGI

23. A. Modifications increasing Federal AGI - income from obligations of any state or its political subdivisions, other than RI (attach documentation)…………………………………………. 23A.
B. Other modifications increasing Federal AGI (see instructions - attach documentation)…………………………………………………………………………………………………………………………… 23B.
C. Total modifications increasing Federal AGI - add lines 23A and 23B……………………………………………………………………………………………………………………………………………… 23C.
24. A. Modifications decreasing Federal AGI - income from obligations of the U.S. government included in Federal AGI but exempt from state income taxes (attach documentation)………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………………
**RHODE ISLAND SCHEDULE D**

**PART 1  TAX COMPUTATION USING MAXIMUM CAPITAL GAINS RATES**

*(FOR TAXPAYERS WHO FIGURE THEIR TAX ON FEDERAL FORM SCHEDULE D OR COMPLETING PARTS 2, 3 OR 4 BELOW)*

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B (col. A x col. B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>1. RI Taxable Income - RI-1040, line 7</td>
<td>1. X 2.04% =</td>
</tr>
<tr>
<td>2. 8% capital gains - Federal Schedule D, line 30 or Federal Schedule D Worksheet, line 18</td>
<td>2. X 2.55% =</td>
</tr>
<tr>
<td>3. 10% capital gains - Federal Schedule D, line 32 or Federal Schedule D Worksheet, line 20</td>
<td>3. X 6.38% =</td>
</tr>
<tr>
<td>4. 20% capital gains - Federal Schedule D, line 36 or Federal Schedule D Worksheet, line 24</td>
<td>4. X 7.14% =</td>
</tr>
<tr>
<td>5. 25% capital gains - Federal Schedule D Tax Worksheet, line 30 - enter in column A</td>
<td>5.</td>
</tr>
<tr>
<td>6. 28% capital gains - Federal Schedule D Tax Worksheet, line 33 - enter in column A</td>
<td>6.</td>
</tr>
<tr>
<td>7. Total capital gains - add lines 2, 3, 4, 5, and 6 from column A</td>
<td>7.</td>
</tr>
<tr>
<td>8. Tax on RI capital gain income - add lines 2, 3, 4, 5 and 6 from column C</td>
<td>8.</td>
</tr>
<tr>
<td>9. RI ordinary income - subtract line 7 from line 1</td>
<td>9.</td>
</tr>
<tr>
<td>10. RI tax on amount on line 9 - use RI Tax Table or RI Tax Rate Schedules</td>
<td>10.</td>
</tr>
<tr>
<td>11. RI tax on capital gain income and ordinary income - add lines 8 and 10</td>
<td>11.</td>
</tr>
<tr>
<td>12. RI tax on amount on line 1 - use RI Tax Table or RI Tax Rate Schedules</td>
<td>12.</td>
</tr>
<tr>
<td>13. Total RI income tax - (the smaller of line 11 or line 12)</td>
<td>13.</td>
</tr>
</tbody>
</table>

**IF YOU HAVE NO TAX REPORTED ON FEDERAL FORMS 4972, 8814, 8615 OR NO RECAPTURE OF FEDERAL TAX CREDITS, ENTER AMOUNT FROM LINE 13 ON LINE 19 BELOW. OTHERWISE, CONTINUE TO PARTS 2, 3, 4 AND 5.**

**PART 2  TAX ON LUMP-SUM DISTRIBUTIONS**

*(FOR TAXPAYERS WHO FILED FEDERAL FORM 4972)*

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B (col. A x col. B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>14. Federal Form 4972, line 30 - enter in column A</td>
<td>14. X 25.5% =</td>
</tr>
</tbody>
</table>

**PART 3  PARENTS' ELECTION TO REPORT CHILD'S INTEREST AND DIVIDENDS OR TAX FOR CHILDREN UNDER AGE 14 WHO HAVE INVESTMENT INCOME**

*(FOR TAXPAYERS WHO FILED FEDERAL FORM 8814 or 8615)*

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B (col. A x col. B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>15. Federal Form 8814, line 9 - enter in column A</td>
<td>15. X 25.5% =</td>
</tr>
<tr>
<td>16. Federal Form 8615, line 18 - enter in column A</td>
<td>16. X 25.5% =</td>
</tr>
<tr>
<td>17. Total - add line 15, column C and line 16, column C</td>
<td>17.</td>
</tr>
</tbody>
</table>

**PART 4  RECAPTURE OF FEDERAL TAX CREDITS**

*(FOR TAXPAYERS WHO HAVE A RECAPTURE OF FEDERAL TAX CREDITS INCLUDED IN THEIR TAX)*

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B (col. A x col. B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>18. Amount of recapture of Federal tax credits - enter in column A</td>
<td>18. X 25.5% =</td>
</tr>
</tbody>
</table>

**PART 5  TOTAL OF PARTS 1, 2, 3 AND 4**

<table>
<thead>
<tr>
<th>Column A</th>
<th>Column B (col. A x col. B)</th>
</tr>
</thead>
<tbody>
<tr>
<td>19. Total - add part 1, line 13; part 2, line 14, column C; part 3, line 17, column C and part 4, line 18, column C</td>
<td>19.</td>
</tr>
</tbody>
</table>
### RHODE ISLAND ALTERNATIVE MINIMUM TAX
(FOR TAXPAYERS WHO FILED A FEDERAL FORM 6251)

2. RI tentative alternative minimum tax - multiply line 1 by 25.5%.
3. RI income tax - RI-1040, page 1, line 8.
4. Tax on lump-sum distributions - Federal Form 4972, line 30.
5. Foreign tax credit - Federal Form 1040, line 43.
6. Add lines 4 and 5.
7. RI percentage - 25.5%.
8. Multiply line 6 by line 7.
9. Subtract line 8 from line 3.
10. RI alternative minimum tax - subtract line 9 from line 2 (if zero or less enter zero) - enter here and on RI-1040, line 9.

### RHODE ISLAND SCHEDULE J
(FOR TAXPAYERS WHO FILED A FEDERAL SCHEDULE J)

11. Enter the amount from Federal Schedule J, line 3.
12. RI tax on line 11 - use RI Tax Table; RI Tax Rate Schedule or RI Schedule D, part 1, whichever applies.
13. Enter the amount from Federal Schedule J, line 8.
14. Enter the amount from Federal Schedule J, line 12.
15. Enter the amount from Federal Schedule J, line 16.
16. Total - add lines 13, 14 and 15.
17. Multiply line 16 by 25.5%.
18. Add lines 12 and 17.
19. Enter the amount from Federal Schedule J, line 21.
20. Multiply line 19 by 25.5%.
21. Subtract line 20 from line 18.
22. Enter amount from RI-schedule D, part 2, line 14.
23. Enter amount from RI-schedule D, part 3, line 17.
24. Enter amount from RI-schedule D, part 4, line 18.
25. Total - add lines 22, 23 and 24.
26. Total Tax - add lines 21 and 25 - enter here and on RI-1040, page 1, line 8 and check the RI Schedule J box.

### T-205P
INDIVIDUAL CONSUMER'S USE/SALES TAX RETURN

27. Schedule of purchases subject to the use/sales tax (List below - If you need more space to list your purchases, attach a separate sheet)

28. Total sale price of purchases subject to the use/sales tax.
29. Amount of tax - multiply line 28 by 7%.
30. Credit for use/sales taxes paid in other states on the above items.
31. Total amount due - subtract line 30 from line 29 - enter here and on RI-1040, page 1, line 14.