

Indiana Disability Retirement Deduction

Attach to Form IT-40 or Form IT-40PNR

2021

Your Social Security Number

Spouse's Social Security Number

Your first name

Initial

Last name

If filing a joint return, spouse's first name

Initial

Last name

▶ Enter the date you and/or your spouse retired. ▶ Enter the employer's name below or give payer's name, if other than employer.

Yourself	Spouse
<input style="width: 40px; height: 25px;" type="text"/> <input style="width: 40px; height: 25px;" type="text"/> <input style="width: 40px; height: 25px;" type="text"/>	<input style="width: 40px; height: 25px;" type="text"/> <input style="width: 40px; height: 25px;" type="text"/> <input style="width: 40px; height: 25px;" type="text"/>
MM DD YYYY	MM DD YYYY

Your Employer's or Payer's Name

▶ Your Daytime Telephone Number

Spouse's Employer's or Payer's Name

Note

- To claim this deduction, you must complete lines 1 through 6 and enclose this schedule with your Indiana return.
- Joint return filers use lines 1A and 3A for you and/or lines 1B and 3B for your spouse's information.

	Column A: Yours		Column B: Spouse's
1. Enter total disability payments received during the year _____	1A <input style="width: 60px; height: 20px;" type="text"/>	.00	1B <input style="width: 60px; height: 20px;" type="text"/>
2. Add lines 1A and 1B _____			2 <input style="width: 60px; height: 20px;" type="text"/>
3. Excess of disability payments over \$100 per week (see line 3 instructions, Table A and the Worksheet) _____	3A <input style="width: 60px; height: 20px;" type="text"/>	.00	3B <input style="width: 60px; height: 20px;" type="text"/>
4. Excess of federal adjusted gross income over \$15,000 (over \$7,500 if married filing separately - see instructions) _____			4 <input style="width: 60px; height: 20px;" type="text"/>
5. Add lines 3A, 3B, and 4 _____			5 <input style="width: 60px; height: 20px;" type="text"/>
6. Line 2 minus line 5 (if less than zero, enter zero). This is your disability retirement deduction. Enter here and on Form IT-40, Schedule 2, under line 11, or on Form IT-40PNR, Schedule C, under line 11 _____			6 <input style="width: 60px; height: 20px;" type="text"/>

Physician's Statement of Permanent and Total Disability

Completed statement must be signed and dated by the physician

Name of Disabled Individual			Date you Retired		
First Name	Initial	Last Name			
			M M	D D	Y Y Y Y

Physician Information		
First Name	Initial	Last Name
Address (Street Address, City, State and Zip Code)		

▶ I certify that the taxpayer named above is permanently and totally disabled (see instructions).

Physician's Signature _____ Date _____