HEWLETT-PACKARD

HP-41**C**

USERS' LIBRARY SOLUTIONS 1981 Taxes



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INTRODUCTION

This HP-41C Solutions book was written to help you get the most from your calculator. The programs were chosen to provide useful calculations for many of the common problems encountered.

They will provide you with immediate capabilities in your everyday calculations and you will find them useful as guides to programming techniques for writing your own customized software. The comments on each program listing describe the approach used to reach the solution and help you follow the programmer's logic as you become and expert on your HP calculator.

KEYING A PROGRAM INTO THE HP-41C

There are several things that you should keep in mind while you are keying in programs from the program listings provided in this book. The output from the HP 82143A printer provides a convenient way of listing and an easily understood method of keying in programs without showing every keystroke. This type of output is what appears in this handbook. Once you understand the procedure for keying programs in from the printed listings, you will find this method simple and fast. Here is the procedure:

1. At the end of each program listing is a listing of status information required to properly execute that program. Included is the SIZE allocation required. Before you begin keying in the program, press XEQ ALPHA SIZE ALPHA and specify the allocation (three digits: e.g., 10 should be specified as 010).

Also included in the status information is the display format and status of flags important to the program. To ensure proper execution, check to see that the display status of the HP-41C is set as specified and check to see that all applicable flags are set or clear as specified.

- 2. Set the HP-41C to PRGM mode (press the PRGM key) and press GTO • • to prepare the calculator for the new program.
- З. Begin keying in the program. Following is a list of hints that will help you when you key in your programs from the program listings in this handbook.
 - a. When you see " (quote marks) around a character or group of characters in the program listing, those characters are ALPHA. To key them in, simply press ALPHA, key in the characters, then press ALPHA again. So "SAMPLE" would be keyed in as ALPHA "SAMPLE" ALPHA].
 - The diamond in front of each LBL instruction is only a visual aid to help you locate labels in the program listings. b. When you key in a program, ignore the diamond.
 - The printer indication of divide sign is /. When you see / in the program listing, press + . c.
 - The printer indication of the multiply sign is \ddagger . When you see \ddagger in the program listing, press \mathbf{X} . d.
 - The character in the program listing is an indication of the APPEND function. When you see -, press APPEND in e. ALPHA mode (press **and the K key**).
 - f. All operations requiring register addresses accept those addresses in these forms:

nn (a two-digit number) IND nn (INDIRECT: In , followed fy a two-digit number) X, Y, Z, T, or L (a STACK address: followed by X, Y, Z, T, or L) IND X, Y, Z, T or L (INDIRECT stack: followed by X, Y, Z, T, or L)

Indirect addresses are specified by pressing **u** and then the indirect address. Stack addresses are specified by pressing • followed by X, Y, Z, T, or L. Indirect stack addresses are specified by pressing • and X, Y, Z, T, or L.

Printer Listing	Keystrokes	Display
01+LBL "SAM PLE" 02 "THIS IS A " 03 "FSAMPLE	LBL ALPHA SAMPLE ALPHA ALPHA THIS IS A ALPHA ALPHA APPEND SAMPLE AVIEW ALPHA	01 LBL [⊤] SAMPLE 02 [⊤] THIS IS A 03 [⊤] ⊢ SAMPLE 04 AVIEW
04 AVIEW 05 6 06 ENTER↑ 07 -2 08 / 09 ABS 10 STO IND	6 ENTER+ 2 CHS ÷ XEQ ALPHA ABS ALPHA	05 6 06 ENTER / 07 -2 08 / 09 ABS
L 11 "R3=" 12 ARCL 03 13 AVIEW 14 RTN	STO C L ALPHA R3= ARCL 03 AVIEW ALPHA RTN	10 STO IND L 11 ^T R3= 12 ARCL 03 13 AVIEW 14 RTN

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* The programs in this book are designed to be run individually or as an interactive chain in which the data is automatically carried from program to program. The programs will be easier and faster to use when the programs are used interactively. The best way to do this is to use an HP-41CV or HP-41C with a Quad Memory Module (HP 82170A).

INDIVIDUAL INCOME TAX

1

Program Package for the HP-41C and HP-41CV Written by Anthony A. Vertuno

What the programs are designed to do

This is a set of programs designed to make the computations needed for:

•Federal Income Tax (Form 1040), including:

Itemized deductions (Schedule A)
Amount of tax on any amount of taxable income, with adjustment for use of the tax table when that is required
Income Averaging (Schedule G)
Capital gains and losses (Schedule D)
Capital loss carry over (Schedule D)
Alternative tax computation from Schedule D
Maximum tax
Alternative maximum tax
Alternative minimum tax

NOTICE--These programs have been written to aid the user in the computation of some of the more common Federal individual income taxes. While the correct computation is important, the determination of taxable and nontaxable income, or deductable and nondeductable expenses is of even greater importance. If you have questions in these areas, consult a Certified Public Accountant, licensed tax preparer, or the IRS for their opinion.

In addition to "bottom line" results, the programs will display the results of the intermediate calculations needed to fill out the appropriate forms. They carry through to the determination of the balance due or refund due.

The programs save all input data and certain key output data. This enables the user to make additional program runs without re-entering all of the input data (the user may make selective corrections) or to make use of the data for other programs, such as state income tax computations.

Because of limitations of data registers/program memory, some line items of the forms are omitted. Those considered most likely to be useful are included.

Memory considerations

The programs in this book are designed to be run individually or as an interactive chain in which the data is automatically carried from program to program. The programs will be easier and faster to use when the programs are used interactively. The best way to do this is to use an HP-41CV or HP-41C with a Quad Memory Module (HP 82170A). This allows many of the programs to be loaded into memory at one time, reducing the need for loading of new programs. Heavy users of these programs would do well to consider using HP's new Extended Function/Memory Modules (HP 82180A and HP 82181A) or the new Digital Cassette Drive (HP 82161A). Contact your HP Authorized Dealer for details.

How the programs are run

Once a program is started, the user can proceed by using the [R/S] key to advance the program step by step, keying in input data with the numeric entry keys where appropriate, and noting the output data produced. If the printer is being used, both input and output data are automatically recorded, and the program does not halt for output displays.

The user continues to advance through the program with the [R/S] key until the end of the program is reached. Subprograms selected by the user will automatically be called and executed.

The programs

This book contains fourteen programs:

- 1. "TX" A control, or master, tax program, which contains subroutines used by the other programs and which can be used to control execution of the Form 1040 programs ("FT" and "P2") and, if used, a state income tax program.
- 2. "TR" Computes the tax payable on given amounts of taxable income.
- 3. "FT" Steps through page 1 of Form 1040.
- 4. "P2" A continuation of the Federal Tax Program ("P2"), which steps through page 2 of Form 1040.
- 5. "TT" A tax table adjustment program (a subroutine of program "P2"), which adjusts the amount of taxable income for use with the tax table.
- 6. "SA" An itemized deduction program, which steps through Schedule A of Form 1040 and computes adjusted itemized deductions for other programs.
- 7. "SG" Computes the tax due on an income averaging basis (Schedule G) and compares it to the tax payable according to the tax rate schedules.
- 8. "SD" Computes the amount of Schedule D income to be reported on Form 1040.
- 9. "DL" Computes the amount of any short-term or long-term capital loss carry over (executes as a subroutine of program "SD").
- 10. "DT" Performs the alternative tax computation from Schedule D and compares it to tax rate schedule tax.
- 11. "MAX" Computes maximum tax (Form 4726) and compares it to tax rate schedule tax.

- 12. "AMX" Computes alternative maximum tax (Form 4726)(executes as a subroutine of program "MAX").
- 13. "MIN" Computes the minimum tax (Form 4625).
- 14. "AMN" Computes the alternative minimum tax (Form 6251).

Although the programs are interrelated and are designed so that each can be linked to at least one other, the programs are separable, and can be selected to meet individual requirements, as explained in the documentation for the individual programs.

Using the programs

It has been found that the programs will be easiest to use if they are loaded and run in a particular sequence. The following instructions for loading the programs assumes the user has an HP-41CV or an HP-41C with a Quad Memory Module.

- 1. Master clear the memory (turn on HP-41 while holding down backarrow key).
- 2. Set SIZE function to 055.
- 3. Load "TX" program and PACK memory ([shift][GTO]..).
- 4. Load "TR" program and PACK memory.
- 5. Load "TT" program and PACK memory.
- 6. Load "FT" program and PACK memory.
- 7. Load "P2" program and PACK memory.
- 8. Load "SD" program and PACK memory.
- 9. Load "SA" program. DO NOT PACK!
- 10. [XEQ] "FT" to start program.

The following is a description of the programs and the order in which they will appear:

- 1. Page one of Form 1040 will begin. Follow the specific instructions for this form as described on page 20.
- 2. After the prompt for Schedule C income, the program will branch to program "SD', Schedule D. See page 59 for instructions.
- 3. After Schedule D is complete, the program will return to page one of Form 1040. Page 1 will finish and the program will switch over to program "P2", (page two of Form 1040) without user assistance. Follow instructions on page 28.
- If flag 01 is set, the program will automatically switch over to Schedule A. If flag 01 is clear, the program will prompt for "DEDS:", net itemized deductions.
- 5. The program now displays "LOAD ALT TAX". This prompts for the loading of one of the three alternative tax computations for line 35 of Form 1040:

a) Maximum Tax (program "MAX" and "AMX")
b) Schedule G (program "SG")
c) Schedule D (program "DT")

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If Maximum Tax is to be computed, it must be computed before Schedule G or Schedule D. This program uses the tax on taxable income, which may be updated as a result of the program.

To run the alternative tax programs, simply load them and run them one at a time. Because the last program you initially entered was not packed, the new program instantly replaces it. By not PACKing each new program, you allow the next program to perform in the same way.

As each alternative tax is calculated, the "low tax" is updated and carried forward. After each alternative tax computation is performed, the prompt "LOAD ALT TAX" appears. When no more alternative taxes are to be computed, press [R/S] without any entry to advance to the next phase.

If you have net long-term capital gains from transactions occuring after June 9, 1981, you may wish to perform the alternative maximum tax computation. This is performed by the program "AMX". Due to limitations in memory, a program must now be cleared for both "MAX" and "AMX" to work together. The recommended procedure when prompted for "LOAD ALT TAX" is to [XEQ] "CLP" "SD", which erases the Schedule D subprogram from memory. It is not needed for any further computations and it leaves room for the "AMX" program to be loaded and packed, and the "MAX" program to be loaded. Do not pack the last program!

- 6. After entering the credits, the prompt "LOAD MIN" will appear. Now load the minimum tax program "MIN" and the previous program will be replaced. If you do not wish to compute minimum tax, press [R/S] and the program will advance to the next prompt. After the minimum tax program has run, control passes back to "P2" program for the next prompt.
- 7. Now the prompt "LOAD AMIN" is displayed. Load the alternative minimum tax program "AMIN" as described previously, or skip to the next prompt by pressing [R/S].
- 8. Page two of Form 1040 now finishes and program "FT" automatically restarts. At this time, you should load and run program "DL' to compute capital loss carry over, if necessary. Prepare the HP-41 for another run by loading program "SA" and setting flag 01 if you wish Schedule A computation. (If you ran program "AMX" and cleared program "SD", be sure to reload "SD"). Remember not to pack the last program loaded.
- 9. If you are rerunning the programs on the same taxpayer, the data has been saved for you and will automatically appear in the display with the prompt. If you are running a new taxpayer, you may wish to [XEQ] "CLRG" to zero all registers and thereby avoid prompts with meaningless data.

Entering input data

<u>All</u> input data is stored and retained in data registers. The program does not alter or erase the contents of the registers holding input data.

Data may be stored directly in the appropriate registers by executing [STO] nn, or it may be entered during a program run when an input display is presented. In the latter case, data is entered by pressing the appropriate numeric entry keys and pressing [R/S]. If no change from the data displayed is desired, simply press [R/S] to continue.

When entering data during a program run, <u>the numeric entry keys must be used</u>. Use the zero key, rather than [CL], to enter a zero. If you make a mistake keying in a number, [CL] may be used to correct the entry or to change it to zero.

CAUTION: USING THE CALCULATOR TO PERFORM MANUAL CALCULATIONS DURING A PROGRAM RUN MAY CAUSE LOSS OF VALUES HELD IN THE STACK FOR PROGRAM USE AND RESULT IN OUTPUT ERRORS.

Rounding

Input data is retained in data registers in the form in which it is keyed in but, for the purposes of calculation, it will be rounded to the display mode used during the program run. Thus, it is possible to run both a dollarrounded program and a dollars and cents program with the same input data.

Scrolling

Setting the display mode to use even dollars ([FIX] 0) helps to eliminate scrolling and will result, in most cases, in displays which are visible in their entirety. Scrolling caused by a single decimal point can be eliminated by clearing flag 29. Note that clearing flag 29 will also eliminate the digit grouping commas.

How the programs are linked

Except for Programs "TT", "TR", "DL", and "AMX", which are executed as subroutines, the programs are linked by [GTO] instructions rather than by [XEQ] instructions. This permits the programs to advance in order even though manual [XEQ] commands may be given during the operation of a subprogram.

In any program being executed as a subprogram of another program, the user may restart that subprogram without losing place in the overall program, so long as he has not yet reached the final display in the subprogram.

Loading the programs

The programs may be loaded from the bar code supplied with this book, or may be keyed in manually. Although the programs have been written to be run either with or without a printer, keystroke entry may be accomplished without having the printer attached.

Use of the printer

The programs are completely printer compatible, and will run equally well with or without a printer.

The printer should be used in MANUAL mode. All input and output displays will be printed. If the user changes the value of an input display, only the corrected value will be printed. Printing will be double-width. Numeric values will be right-justified, with no wrap-around.

If a printer is used, program execution will not stop for output displays, regardless of the status of flag 04. The program will stop for input displays if flag 03 is clear, and will not stop for those displays if flag 03 is set. Setting flag 03 will cause the calculator to produce a single printed output from the beginning to the end of the running program including all subprograms and subroutines called.

The programs control printer operation by testing flag 21. Plug in the printer and turn it on, and it will work with the programs. If you turn the printer off, you do not have to unplug it; simply clear flag 21 and the program will run as if the printer were absent. Remember to set flag 21 again when you want to reactivate the printer.

Modifying the programs

The programs may be modified to suit the needs of individual users in two basic ways:

- 1. Change of line item displays. This may make running the program more convenient for the user, and, assuming that the new label is an alpha string of the same length as the old label, will not change the length of the program. Program operation would not be changed.
- 2. Addition or deletion of displayed line items. Changes of this sort will have an impact on the length of the program being altered. In general, the user should allow about two program registers for the addition of a line item and its operation. An additional register is needed to provide storage for an input item.
- CAUTION: When making any operational changes to the programs, remember to keep track of the input-value index register (subroutine "X" of program "TX") and remember that some registers containing stored input values are accessed by more than one program.

Use of a state tax program

Because many states have tax forms based on the federal Form 1040, it may be convenient to use a program for state income tax using the values produced by these federal tax programs. If the user desires to use such a state tax program, and it has the label "ST", it will be called by the control program "TX" after execution of the programs for federal Form 1040 ("FT" and "P2"). The subroutine "Z" for taxes paid and withheld may be used as a subroutine of a state tax program.

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Display formatting

All displays are labelled to show what they represent. In many cases, it has been possible to use descriptive labels rather than line numbers from the tax forms so that the programs may be run without constant reference to the tax forms or program documentation.

CAUTION: The program labels and the descriptions in the program documentation are provided for convenience in using these programs. Refer to the tax forms and instructions to make sure that the data used in the programs are correct and appropriate for the use made.

There are four kinds of displays:

- "Locator prompts" (alpha only), which identify programs called. Program execution is advanced by pressing [R/S]. If a printer is being used, locator prompts will be printed to identify programs and subprograms, and the locator prompts of subprograms called automatically will not cause a pause in execution.
- 2. Input prompts (alpha-numeric with a colon and space (:) between the alpha portion and the number). Appropriate numeric data is keyed in and [R/S] is pressed to advance the program. Numeric data appearing in the display may be left unchanged by pressing [R/S] without numeric entry. Setting flag 03 will suppress all input prompts.
- 3. Output prompts (alpha-numeric with an equals sign (=) between the alpha portion and the number). Data entry is not called for. Press [R/S] to proceed.

Setting flag 04 will suppress <u>most</u> output prompts. Some output prompts, such as "bottom line" items for each program and certain significant intermediate results, are not suppressed by setting flag 04.

4. Information prompts (alpha only). Information to be noted is provided for the user. For example, the display "TAX TABLE" informs the user that the amount of tax to be shown will be the amount of tax shown on the tax table.

CONTROL PROGRAM FOR THE INCOME TAX PROGRAM PACKAGE

Program "TX"

"TX" contains the following subroutines which are used by the other programs in the package:

- "P" This routine is accessed in the initialization portion of all of the other routines. "P" is used to print the locator prompt of a routine if a printer is being used. It also sets double-wide print mode and stores the initial value for the data-storage index register, R07.
- "X" This routine is made use of in the input of data. The routine halts the program and prompts the user with the alpha name and current numeric value of the item. When the program is resumed (via [R/S]), the routine tests to see if numeric data was entered during the halt. If new data was entered, it is stored in the register indicated by the index register, R07. The program halt in this routine may be supressed by the setting of flag 03.
- "Y" This routine is used in the output of data. It displays the item name and its current value each separated by an equals sign (=). If flag 21 is clear, the program halts to give the user enough time to view and/or record the result. The halt in this case is not a request for data entry and may be supressed altogether by the setting of flag 04.
- "V" This routine is similar to "Y" except that its halts are not supressed by flag 04.
- "Z" This routine is the terminal routine of the package. It prompts for the amount of tax withheld and paid and calculates the balance due or refund due. This routine may also be called by a user-written state tax program.
- "S" This is used to input the taxpayer's filing-status code.
- "ZB" Computes the taxpayer's Zero Bracket Amount.

The program "TX" cannot be used apart from the other programs in the package and it must be present during the running of all of them. "TX" orders the execution of the federal tax program package and can be used to order the execution of a user generated state program package.

				SIZE: *
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "FT" and pack it.		[GTO]	
3	Set appropriate SIZE and desired			
	display mode.			
4	Load any other desirable programs and			
	optionally pack them. (See the			
	instructions for the individual			
	programs of interest).**			
5	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used it should be set to <u>manual</u>			
	mode).			
6	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
7	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
8	Begin execution.		[XEQ] "TX"	INCOME TAX
9	Note the locator prompt and continue			
	(this prompt is not printed).		[R/S]	1040
10	At this point, control is passed to			
	program "FT".			
	completion of the Federal Tax Package.	k wnich car	De called by "I)	at the
	* Varies with the subprograms loaded.			

Program Listings

01+LBL "TX"		49 ARCL X	
02+LBL 14		50 CF 22	
03 " INCOME	Heading	51 FC? 03	
TAX"	neading	52 PROMPT	
04 PROMPT		53 FS? 21	
05 SF 05		54 VIEW X	
06 GTO "FT"	Start Fed. Tax	55 CLD	
07+LBL "T1"		56 FC? 22	Check for new
08 SF 05		57 RTN	data input
09 SF 25		58 X<>Y	
10 GTO "ST"	Start State Tax	59 RDN	
11 CF 25		60 STO IND	Store new or re-
12 GTO 14	Restart	07	store old data
13+LBL "ZB"	Subroutine for	61 RND	
14 17	Zero Bracket	62 RTN	
15 GTO IND	tion	63+LBL "V"	Output subroutine
08	cron	64 SF 19	
16+LBL 05		65+LBL "Y"	
17+LBL 02		66 "⊢="	
18 11		67 RND	
19 +		68 FS? 21	
20+LBL 04		69 AVIEW	
21+LBL 01		70 FS? 21	
22 6		71 VIEW X	
23 +		72 CLD	
24+LBL 03		73 ARCL X	
25 1 E2		74 FC?C 19	
26 *		75 FC? 04	
27 RTN		76 FS? 21	
28+LBL "P"	Initializing	77 RTN	
29 ADV	Subroutine	78 PROMPT	
30 SF 12		79 RTN	
31 FS? 21		80+LBL "Z"	Final output sub-
32 AVIEW		81 "TOT PD"	routine
33 STO 07		82 XEQ "X"	
34 RDN		83 -	
35 RTN		84 ENTER↑	
36+LBL "S"	Status Input Sub-	85 FC?C 08	
37 7	routine	86 STO 05	
38 STO 07		87 "BHL DUE	
39 RDN		" 	
40 "STATUS"		88 X(0?	
41+LBL "X"	Input Subroutine	89 "RFNJ"	
42 ISG 07	Increment index	90 H85	
43+LBL 00	Dummy step	91 BEEP	
44 RCL IND	Recall current	92 XEW "Y" 07 END	
07	value in data	93 END	
45 KND	iey.		
46 "H: "			
47 FS? 21			
48 HVIEW			

REGISTERS, STATUS, FLAGS, ASSIGNMENTS¹¹

	DATA RE	GISTERS				STA	TUS		
00		50	SIZE ENG DEG	*	TOT FIX - RAD	. REG. <u>3</u> SCI GR.	1 + AD	USER MOI 0 ON0	DE IFF
05	Scratch	55	-			FLA	AGS		
			#	S/C	SET	NDICATES	S	CLEAR INDI	CATES
07	Index register		0		Indicat	es non-			
08	Status information				suppre	ssed ou	tput		
					displa	<u>ys in s</u>	ub-		
10		60			routin	<u>es "Y"+</u>	<u>"V"</u>		
			3		Suppres	ses inp	ut		
					displa	<u>y when</u>	set		
			4		Suppres	ses out	put		
15		65	5		Einct 1	y when	set		
15		05			Progra	ever su	<u>u-</u>		
			8		lleod wi	th stat			
					tax nr	ograms	<u> </u>		
			12		Printer	double	_		
20		70			wide	doubre			
			21		Printer	enable			
			22		Numeric	data i	nput		
			25		Error i	gnore	-		
25		75							
20		80							
30		80							
35		85							
						ASSIGN	IMEN	тѕ	
			F	UNCT	ION	KEY	F	UNCTION	KEY
40		90	<u> </u>						
45		95	ļ						

* Minimum size required: Varies with the individual tax programs used in connention with this program.

FEDERAL TAX RATE SCHEDULES

Program "TR"

This program computes federal income tax according to the tax rate schedules X, Y, and Z on a given amount of taxable income. The appropriate schedule is selected by the program on the basis of the status code entered by the user.

"TR" may be executed alone, or as a subroutine of programs "P2", "SG", "DT", "MAX" or "AMX". The program's first global label, "TR", is used to execute the program as a stand-alone. The second global label, "R", is used when accessing the program as a subroutine.

There is no locator prompt, so uninterrupted execution begins immediately upon calling the program.

To use this program as a subroutine, simply make sure that it is loaded at the same time that one or each of the above calling programs is.

To use this program on its own:

- 1. Place the amount of taxable income in the X-register.
- 2. Press [XEQ] "TR".
- 3. The program prompts for status input. If flag 03 is set, prompt is suppressed and the user must be sure that the proper status code is stored in register 08. As with other inputs values, the status code, once entered, will remain unchanged until the user enters a new one.

After execution, the amount of tax is in the X-register and appears in the display with the label "TAX=". The amount of taxable income has been stored in register 02, the amount of tax has been stored in register 03.

EXAMPLE:

This example will use "TR" as a stand-alone to compute the amount of tax on an income of \$23,456.00 for a filing status of 1 and 2.

The programs "TX" and "TR" must be loaded and a SIZE setting greater than 9 must be made. The status of flag 21 must be chosen to match the status of the printer (see the User Instructions for details) and flag 03 must be clear in order for the input prompts to be generated. The example assumes that flags 28 and 29 are set, that the display mode is FIX 0 and that the current value for STATUS is 0.

DISPLAY	KEYSTROKES	COMMENTS
	23456	Enter amount of taxable income.
STATUS: 0. TAX=4,133. 23,456. STATUS: 2 TAX=5,285.	2 [R/S] [RCL] 02 [R/S] 1 [R/S]	<pre>Status = 2. Amount of tax for status 2. Recall amount of taxable income. Status = 1. Amount of tax for status 2.</pre>

				SIZE: 009
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "TR" and pack it.		[GTO]	
3	Set SIZE and desired display mode.			
4	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to manual			
	mode).			
5	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
6	Key in taxable income and begin execution			
	(If flag 21 is set and printer is on,			
	"TXABLE:" and INCOME are printed out. If			
	flag 21 is cleared the two values are			
	not_printed).	income	[XEQ] "TR"	STATUS: ()
7	Key in your filing status if different			
	from displayed value.* [R/S] continues.	status	[R/S]	TAX= ()
8	See total amount of tax.			
9	For different taxable income and/or status			
	key in new income.		[R/S]	
10	Go to step 7			
	* If flag Ø3 is set, this prompt is ignored			

Program Listings

01+LBL "TR"		44 *
02+LBL 00		45+LBL 02
03 STO 02	Store taxable	46+LBL 05
04 SF 12	income	47 .3421214
05 CF 02		3
06 ADV		48 ENTER†
07 "TXABLE:	Make printer re-	49 1.422334
	cord of taxable	456
08 FS? 21	income and	50 XEQ 11
09 AVIEW	status	51 .4142445
10 FS? 21		3
11 VIEW X		52 XEQ 12
12 CLD		53 53
13 XEQ "S"		54 XEQ 09
14 RDN		55 .1061422
15+LBL "R"	Subroutine label	56
16.0		56 ENTER↑
17 510 00		57 .655542
18 RIN		58 CF 10
19 SE 09		59 XEQ 11
20 SE 10		60.2385305
21 1 F2		3
22 /		61 XEQ 12
23 GTO IND	Select tax rate	62 GTO 10
08	schedule	63+LBL 11
24+I BI 01	Tax rate sched X	64 STO 01
25 .2311102		65 RDN
1		66+LBL 12
26 ENTERT		67 STO 05
27 1.422123		68 CLX
24		69 3
28 XEQ 11		70 X<>Y
29.2023212		71 FS? 10
1		72 ISG Y
30 XEQ 12		73+LBL 14
31.3253535		74 X<=0?
3		75 GTO 06
32 ENTER1		76 XEQ 07
33.4555685		77 DSE Y
2		78 GTO 14
34 XEQ 11		79+LBL 06
35 74		80 X<>Y
36 XEQ 09		81 RDN
37 .1382652		82 RTN
65		83+LBL 07
38 CF 10		84 3
39 XEQ 12		85 FS? 10
40 GTO 10	Tax rate sched Y	86 DSE X
41+LBL 03		87+LBL 00
42 CF 09		88 10†X
43 2	•	89 ST* 05

Program Listings

90 CLX	136 "TRS"	
91 RCL 05	137 FS?C 02	
92 FRC	138 RTN	
93 X<> 05	139 1.25	
94 INT	140 %	1.25% credit
95♦LBL 09	141 -	
96 -	142 STO 03	••••••••••••••••••••••••••••••••••••••
97 X = 02	147 "TOY"	Store amt of tax
90 PTN	143 188	
20 KIN 99 10	144 XEQ "V"	
77 10 100 CT+ 01	143 FS? 21	
	146 PRUMPI	
101 LLX	147 GIU 00	
102 KLL 01	148 END	
103 FRU		
104 X<> 01		
105 INI		
106 %		
107 ST+ 00 Tax rate sched 7		
108 RDN		
109 RTN		
110+LBL 04		
111 .2321212		
2		
112 ENTER ⁺		
113 1.422422		
556		
114 XEQ 11		
115 .3132325		
3		
116 XEQ 12		
117 53		
118 XEQ 09		
119 .0531061		
59		
120 ENTERA		
121 485452		
122 CF 10		
123 XEQ 11		
124 2122655		
7		
125 XEO 12		
129 *		
170.0		
171 5020 09		
131 FU:U 07 179 CT/ V		
132 317 1 177 DDN		
133 KUN 174 ECO 07		
134 FU? 07 175 DUD		
192 KNN		

REGISTERS, STATUS, FLAGS, ASSIGNMENTS¹⁷

DATA	REGISTERS				STA	TUS		
00 Scratch 01 Scratch 02 Fed.taxable incom 03 Fed. tax payable	50 ne	SIZI	00	9 TOT. F FIX RAD	REG SCI GR/	AD	USER MO 	DE)FF
05 Scratch	55				FLA	GS		
		#	S/C	SET IND		6	CLEAR IND	CATES
		2		Subrouti	ne ind	ica-		
<u> 08 Status informatio</u>	n			tor	o adiu	c+		
10	60			ment in	<u>dicato</u>	r		
		9		General	purpos	e		
		10		General	purpos	e		
		12		Printer	<u>double</u>	-		
15	65			Wide				
	05	21		Printer	enable			
20	70			···				
25	75							
30	80							
	- 05							
35	85							
				A	SSIGN	MEN	TS	
			FUNCI		KEY		UNCTION	KEY
40	90							····•
45	95							
	35							
 								

FEDERAL TAX (FORM 1040, PAGE 1)

Program "FT"

This program steps through page 1 of Form 1040, displaying many of the more commonly used line items. Where the user needs line items not displayed in the program, other unneeded line items may be used or the program may be modified such that by changing the labels on line items not needed.

Program "FT" can be executed with or without program "SD" (Schedule D: Capital Gains and Losses) as a subprogram. "FT" will be started automatically during execution of the control program "TX". It may also be started by executing "FT" manually.

Sequence of displays during program execution:

1040	Locator prompt identifying the program.						
STATUS:	Filing status code checked on Form 1040.						
	Code Filing Status 1 Single 2 Married, filing jointly 3 Married, filing separately 4 Head of Household 5 Qualifying widow(er)						
EXMPS:	Number of exemptions claimed on Form 1040.						
WAGES:	Total wages received.						
INT:	Total taxable interest income.						
DIVS:	Total taxable dividends received.						
I &D=	Total interest and dividends.						
EXCLSN:	Exclusion for interest and dividents.						
NET I&D=	Total interest and dividends less exclusion.						
S.TX RF:	State tax refund received (include only if taxpayer itemized deductions for previous tax year).						
SCH C:	Schedule C income (income from business or profession).						
SCH D:	Schedule D income (capital gain or loss).						
	Note: If program "SD" is present, it will be called and executed to compute Schedule D income. On completion of subprogram execution, execution of this program will automatically continue. If the subprogram is not executed, the value of this item may be keyed in as a single figure as are other input data.						

- SCH E: Schedule E income (rents, royalties, partnership income, etc).
- OTH IN: Other income. (All income items not previously entered).

GRS IN= Gross income.

EXPS: Moving expense or unreimbursed employee's business expenses.

Contributions to IRA or Keogh plan. IRA:

> These two items are the only ones provided for Note: adjustments to income. All adjustments available to the taxpayer must be entered in one of these two locations.

- TOT ADJ= Total adjustments to income
- # AGI= Adjusted Gross Income

Setting flag 04 does not suppress this output.

If program "P2" is present it is called as a continuation of the Form 1040 program. If "P2" is not present, "FT" is restarted.

EXAMPLE:

Fill out page one of form 1040 based on the form on the next page.

Programs "TX" and "FT" must be loaded and the SIZE set to at least 021. Flags 03 and 04 should be cleared to allow all of the displays to be seen. Flag 21 should be set to correspond to the status of the printer: Printer on - set flag 21, printer off or non-existent - clear flag 21. This example assumes that the initial values for all of the inputs is zero, that the display mode is FIX 2 and that flags 28 and 29 are set.

DISPLAY	KEYSTROKES	COMMENTS
1040 STATUS: 0.00 EXMPS: 0.00 WAGES: 0.00 INT: 0.00 DIVS: 0.00 I+D=990.00 EXCLSN: 0.00 NET I+D=590.00 S.T RF: 0.00 SCH C: 0.00 SCH C: 0.00 SCH E: 0.00 GRS IN=36,401.50 EXPS: 0.00 IRA: 0.00 TOT ADJ=3,498.44	[XEQ] "FT" [R/S] 2 [R/S] 7 [R/S] 20814.65 [R/S] 427,5 [R/S] 562.5 [R/S] [R/S] [R/S] [R/S] [R/S] 1,392.00 [R/S] 11,354.85 [R/S] 2,250.00 [R/S] [R/S] 3,498.44 [R/S] [R/S] [R/S]	Begin execution. Locator prompt.
AGI=32,903.06		Adjusted gross income.

				SIZE: 021
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX"and pack it.		[GT0]	
2	Load program "FT" and pack it.		[GTO]	
3	Set SIZE and desired display mode.			
4	Load any optional programs that you desire			
	(i.e., "SD" or "P2") and pack if desired.			
5	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to <u>manual</u>			
	mode).			
6	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CR] Ø3	
7	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
8	If "FT" is not to be called from "TX"		[CF] Ø5	
9	Begin execution.		[XEQ] "FT"	1040
10	Note locator prompt and continue. (If			
	called from "TX", execution will			
	continue from this point. If flag 21 is			
	is set and "FT" has been called from			
	"TX", this [R/S] will be bypassed).		[R/S]	1040
				STATUS: ()
11	Key in your filing status if different			
	from the displayed value. *			
	[R/S] continues.		[R/S]	EXEMPS: ()

				SIZE: 021
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
12	Key in the number of exemptions claimed if			
	different from the displayed value. *			
	[R/S] continues.	exemptions	[R/S]	WAGES: ()
13	Key in your total wages, if different from			
	the displayed value. * [R/S] continues.	wages	[R/S]	INT: ()
14	Key in your total taxable interest income			
	if different from the displayed value. *			
	[R/S] continues	interest	[R/S]	DIV: ()
15	Key in your total taxable dividends			
	received if different from the displayed			
	value. * [R/S] continues.	dividends	[R/S]	I+D= ()
16	See the total interest and dividends.			
	[R/S] continues.** (If flag Ø4 is set and			
	flag 21 is clear, this display will be			
	omitted).		[R/S]	EXCLSN: ()
17	Key in the exclusion for interest and			
	dividends. * [R/S] continues.	exclusion	[R/S]	NET I+D= ()
18	See the total interest and dividends less			
	exclusion.** [R/S] continues.		[R/S]	S.T RF: ()
19	Key in your state tax refund. * (Do this			
	only if you itemized your deductions for			
	last year). [R/S] continues.	state tax	[R/S]	SCH C: ()
20	Key in your Schedule C income.*			
	[R/S] continues.	sched. c	[R/S]	SCH D: ()
				or SCHED D
21a	If program "SD" has been loaded, " SCHED D"			
	is displayed and control is passed to "SD	11		

				SIZE: 021
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	The user should then turn to program "SD"			
	User Instructions and continue.			
21b	If program "SD" has not been loaded, key in			
	your Schedule D income.* [R/S] continues.	sched. D	[R/S]	SCH E: ()
22	Key in your Schedule E income. *			
	[R/S] continues. (If "SD" was called,			
	control resumes at this point).	sched. E	[R/S]	OTH IN: ()
23	Key in all other income items not previously	,		
	entered. * [R/S] continues.	other	[R/S]	GRS IN= ()
24	See your gross income. ** [R/S] continues.		[R/S]	EXPS: ()
25	Key in your expenses. * [R/S] continues.	expenses	[R/S]	IRA: ()
26	Key in your contributions to IRA or the			
	Keogh plan. * [R/S] continues.	contri- bution	[R/S]	TOT ADJ= ()
27	See the total adjustments to your income. *			
	[R/S] continues.		[R/S]	AGI= ()
28	See your adjusted gross income. [R/S]#			
	continues.		[R/S]#	
29a	If program "P2" has been loaded, control is			
	passed to that program. The user should			
	refer to the User Instructions for that			
	program.			
29b	If "P2" is not loaded, go to step 10.			
	* If flag Ø3 is set, this prompt is ignored	•		
	<pre>** If flag Ø4 is set and flag 21 clear, this # If flag 21 is set and the printer attached</pre>	display wi 4, this [R/	S] will not be p	performed.

Program Listings

01+LBL "FT" 02+LBL 00 03 "1040" 04 CF 25 05 FS? 05 06 FC? 21 07 PROMPT 08 XEQ "P" 09 XEQ "S" 10 "EXMPS" 11 XEQ "X" 12 "WAGES"	Heading Initialize Status input Input prompts	51 "OTH IN" 52 XEQ "X" 53 + 54 "GRS IN" 55 XEQ "Y" 56 "EXPS" 57 XEQ "X" 58 "IRA" 59 XEQ "X" 60 + 61 "TOT ADJ	
13 XEQ "X" 14 "INT" 15 XEQ "X" 16 "DIVS" 17 XEQ "X" 18 + 19 "I+D" 20 XEQ "Y" 21 "EXCLSN" 22 XEQ "X" 23 - 24 X<0? 25 CLX 26 "NET I+D	Output prompt	62 XEQ "Y" 63 - 64 STO 06 65 "AGI" 66 XEQ "V" 67 SF 25 68 GTO "FF" 69 CF 05 70 GTO 00 71 .END.	Store AGI Continue with page 2 Restart
27 XEQ "Y" 28 + 29 "S.T RF" 30 XEQ "X" 31 + 32 "SCH C" 33 XEQ "X" 34 + 35 STO 05 36 SF 06 37 SF 25 38 GTO "SD" 39 CF 06 40 "SCH D" 41 XEQ "X" 42*LBL "FA" 43 16 44 STO 07 45 RDN 46 RCL 05 47 + 48 "SCH E" 49 XEQ "X" 50 +	Branch to sched D progam Reinitialize index register		

REGISTERS, STATUS, FLAGS, ASSIGNMENTS

24

DATA REGISTERS			STATUS							
00		50		SIZE ENG DEG	02	1 TOT FIX RAD	T. REG3; X SC GR	2 + I AD	USER MO 	DE DFF
05	Scratch	55			INIT		FL	AGS		
06	Fed. adjusted			#	S/C	SET	INDICATE	S	CLEAR IND	ICATES
	gross income			5		First	level s	-du		
07	Index register					progr	am			
10				6		Second	level	sub-		
10		60		01		progr	am			
				21		Printe	r enable	<u> </u>		
				25		Error	ignore			
15		65					1990 - 1991 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 - 1997 -			
		05								
20		70								
		1								
25		75								
30		80								
							1			
35		85								
		-								
							ASSIGN	IMEN	TS	
					FUNCT	ΓΙΟΝ	KEY	F	UNCTION	KEY
40		90								
45		95								

FEDERAL TAX (Form 1040, Page 2)

Program "P2"

Program "P2" begins at the top of page 2, Form 1040. Programs "FT" and "P2" run as a unit, but their separability enables a user who has already determined Adjusted Gross Income with program "FT" to unload that program to make room for others.

Program "P2" may be executed with programs "SA", "TT", "SG", "DT", "MAX", "MIN", and/or "AMN"; or without any of these subprograms. Setting flag 01 directs execution of subprogram "SA". Setting flag 19 similarly calls one of the alternate tax programs "SG", "DT", or "MAX".

Sequence of displays during program execution:

- 1. When execution begins with this program, it begins here:
 - 1040 P2 Locator prompt identifying the program.
 - STATUS: Filing status box checked on page 1, Form 1040. (Not a line item on page 2).
 - AGI: Adjusted Gross Income. This item will ordinarily have been computed by program "FT". If execution begins with program "P2", AGI is shown as an input item to allow the user to make any necessary corrections to the value displayed.
- 2. If program execution is continuing from program "FT", execution of this program begins here:
 - DEDS: Net Itemized Deductions. Note: If program "SA" is present and if flag 01 is set, program "SA" will be called and itemized deductions will be computed. On completion of subprogram execution, this program will automatically continue. If the subprogram is not executed, the value of this item may be keyed in as a single figure as are other input data.
 - L32c= Line 32c, Form 1040. Adjusted Gross Income less Net Deductions.
 - EXMPS= Number of exemptions x \$1,000.

TXABLE= Taxable income. Line 34, Form 1040. Note: When subprogram "TT" is present, this amount of taxable income is automatically adjusted to the center of the bracket used in the tax table. The adjusted amount is not displayed. The unadjusted amount is stored in register 02 for use in other programs.

- TAX TABLE This display informs the user that the amount of tax computed will be the amount from the tax table contained in the instructions to Form 1040. It does not appear if program "TT" is not present or if the amount of taxable income is too large for the tax table.
- TRS= Tax from tax rate schedule. (Not a line item on Form 1040).
- 1.25% = 1.25% of the tax rate schedule. (Not a line item on Form 1040).
- # TAX= Tax. Stored in register 03. Note: If an alternate tax computation program ("SG", "MAX", or "DT") is present and if flag 19 is set, the program will automatically be called at this point. On completion of subprogram execution, this program will automatically continue.
 - CRDTS: Total credits available to the taxpayer. Note: If the taxpayer is liable for additional tax to be entered on Line 36, Form 1040, the user should reduce the value of credits being entered here by the amount of such tax.
 - NET= Net tax. Tax less credits. Line 47, Form 1040.
 - MIN TX: Minimum tax.
 - Note: If program "MIN" is present, it will be executed to compute Minimum Tax. On completion of subprogram execution, this program will automatically continue. If the subprogram is not executed, the value of this item should be keyed as a single figure as are other input data.
 - AMIN TX: Alternate Minimum Tax. Note: If program "AMN" is present, it will be called to compute the Alternate Minimum Tax. On completion of subprogram execution, this program will automatically continue. If "AMN" is not executed, the value of this item should be keyed in as a single figure as are other input data.
 - OTH TXS: Other taxes.
 - TOTL= Total of net tax (after credits) and other taxes.
- TOT PD: Total withholding and estimated payments made.
- # BAL DUE= Balance due.
- # RFND= Refund.

or

Setting flag 04 does not suppress this output.

EXAMPLE:

Fill out page two of form 1040 based on the information provided on the sample form.

Programs "TX", "TR", "P2" and "TT" must be loaded and SIZE set to at least 028. This example assumes that the initial value for all inputs is zero, that the display mode is FIX 2, and that flags 28 and 29 are set. Since neither "SA" nor one of the alternative tax programs is to be called, flags 01 and 19 should be cleared. Flag 21 should beset to correspond to the state of the printer; printer on - set flag 21, printer off or non-existent - clear flag 21.

DISPLAY	KEYSTROKES	COMMENTS
1040 P2 STATUS: 0.00 AGI: 0.00 DEDS: 0.00 L32c=30,654.19 EXEMPS=7,000.00 TXABL=23,654.19 TAX TABLE TAX=4,193.00 CRDTS: 0.00 NET=3,880.50 MIN TX: 0.00 AMIN TX: 0.00 OTH TXS: 0.00 TOTL=4,442.45 TOT PD: 0.00	[XEQ] "P2" [R/S] 2 [R/S] 32903.06 [R/S] 2248.87 [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] 561.95 [R/S] [R/S] 4688.07 [R/S]	Begin page 2. Locator prompt. Filing status. Adjusted gross income. Total taxes paid.
RFND=245.62		Amount refunded.

				SIZE: 028
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and "TR" and pack them.		[GT0]	
2	Load program "P2" and pack it.		[GT0]	
3	Load any of the optional subroutines you			
	wish to access.			
4	Set the appropriate SIZE and desired dis-			
	play mode.			
5	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer doesn't exist or is off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to manual			
	mode).			
6	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
7	To suppress output displays		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
8	If program "SA" is loaded and you wish it			
	called from "P2" -		[SF] Ø1	
	otherwise -		[CF] Ø1	
9	If an alternative tax computation program			
	has been loaded (either "SG", "DT" or			
	"MAX") and you wish it called from "P2" -		[SF] 19	
	otherwise -		[CF] 19	
10	If "P2" is not called from "TX" via "FT" -		[CF] Ø5	
11	Begin execution		[XEQ] "P2"	1040 P2
12	Note locator prompt and continue.		[R/S]	STATUS: ()

				SIZE: 028
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
13	Key in your filing status if different			
	from the displayed value.*			
	[R/S] continues.	1-5	[R/S]	AGI: ()
14	Key in your adjusted gross income if			
	different from the displayed value. *			
	[R/S] continues.	AGI	[R/S]	SCHED A
				or DEDS: ()
15a	If flag Ø1 is set and program "SA" is			
	loaded, control is passed to "SA". The			
	user should turn to the User Instructions			
	for that program to continue.			
15b	If flag Ø1 is clear or "SA" not loaded,			
	"DEDS; ()" is displayed. * Key in your			
	net itemized deductions. [R/S] continues.	deductions	[R/S]	L32c= ()
16	See line 32c from Form 1040.** [R/S]			
	continues. (If program "SA" was called,		·····	
	control is returned to "P2" beginning			
	with this display).		[R/S]	EXEMPS= ()
17	See the number of exemptions multiplied			
	by \$1,000.** [R/S] continues.		[R/S]	TXABL= ()
18	See your taxable income. [R/S]# continues.		[R/S]	TAX TABLE
				or TRS= ()
19a	If the display "TAX TABLE" appears, the			
	amount of tax computed will be the			
	amount from the tax table contained in			
	the instructions to Form 1040. This dis-			
	play will not appear if program "TT" is			

				SIZE: 028
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	not loaded or if the amount of taxable			
	income is too large for the tax table.		[R/S]#	TAX= ()
	Go to step 21.			
19b	If "TRS= ()" is displayed, note this tax			
	from the tax rate schedule and continue.		[R/S]**	1.25%=
20	Note the value which is 1.25% of the tax			
	rate schedule tax and continue.		[R/S]#	TAX= ()
21	If an alternative tax computation program			
	("SG", "MAX" or "DT") is present and if			
	flag 19 is set, control will pass to and			
	return from the subprogram at this point.			
	The User Instructions for the particular			
	program should be consulted at this			
	point. Otherwise, continue execution.		[R/S]	CRDTS: ()
22	Key in the total credits available to you,			
	if different from the displayed value,			
	and continue.*	credits	[R/S]	NET= ()
23	See net tax and continue.**		[R/S]	MIN TAX
				or MIN TX: ()
24a	If program "MIN" has been loaded, "MIN TAX"			
	will be displayed and control will be			
	passed to "MIN". The user should refer			
	to the User Instructions for "MIN" in			
	this case. Control is returned to "P2"			
	at this time.			
24b	If program "MIN" has not been loaded, "MIN			
	TX: ()" is displayed. Key in the			

				SIZE: 028
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	Minimum Tax and proceed.*	min. tax	[R/S]	ALT MIN TAX
			or	AMIN TAX: ()
25a	If program "AMN" has been loaded, "ALT MIN			
	TAX" will be displayed and control will			
	be passed to that program and returned			
	to "P2" at this time. The user should			
	reference the User Instructions for that			
	program to proceed.			
25b	If program "AMN" has not been loaded, "AMIN			
	TX: ()" is displayed. Key in the			
	amount of alternative minimum tax and			
	proceed.*	alt. min tax	[R/S]	OTH TXS: ()
26	Key in the amount of other taxes if differ-			
	ent from the displayed value.*	other	[R/S]	TOTL= ()
27	See the total of net tax and other taxes			
	and continue.**		[R/S]	TOT PD: ()
28	Key in the total withholding and estimated			
	payments and other payments made, if			
	different from the displayed value.*	total paid	[R/S]	BAL DUE= ()
				or RTND= ()
29	<u>Either the balance you owe or the amount</u>			
	to be refunded to you id displayed.		[R/S]	
30a	If "P2" was called from "TX" via "FT", then			
	control is passed back to "TX". A user-			
	written state tax program is searched for			
	and called if it exists. Finally, control			
	is passed back to "TX" and the program is			

r

				SIZE: 028
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	repositioned for another run.			INCOME TAX
30b	If "P2" was not called indirectly from "TX"			
	and "FT" is loaded, control is recycled			
	to the beginning of that program.			1040
30c	If "P2" was run on its own and "FT" is not			
	loaded, control is recycled to the			
	beginning of "P2", step 12 of these			
	instructions.			1040 P2
	<pre># If flag 21 is set and the printer is att</pre>	ached, thi	s [R/S] will not	be performed.
	If flag Ø3 is set, this prompt is ignore ** If flag Ø4 is set and flag 21 is clear,	d. this displ	ay will be omitt	ed.
01+LBL "P2"		51 XEQ "Y"		
-------------------------	-------------------	----------------------	--------------------	
02+LBL 00		52+LBL 06		
03 " 1040	Heading	57 -		
P2"	neading	54 500 07		
		54 FU:U 07		
		55 610 89		
	Initialize status	56.5		
06 XEQ "5"	input	57 +		
07 5		58 INT		
08 STO 07		59+LBL 09	Ctowe amt of tay	
09 "AGI"	Check AGI	60 STO 03	Store and of lax	
10 XEQ "X"		61 "TAX"		
11 20		62 XEQ "V"		
12 STO 07		63 XEQ 11		
13+LBL "FF"		64 ES2C 19		
14 XEQ 11			Branch to alterna	
15 500 01			tax computation	
15 65: 01		66 LF 06	program	
	Branch to sched A	67 • LBL "F2"		
17 CF 06	program	68 21	Reinitialize index	
18 CF 25		69 STO 07	register	
19 "DEDS"		70 RDN		
20 XEQ "X"		71 "CRDTS"		
21+LBL "F1"		72 XEQ "X"		
22 RCL 06		73 -		
23 X<>Y		74 9702		
24 -				
25 "1 326"			Store ant on line	
		76 510 27	47 Form 1040	
	Numbers of exampt	77 "NEI"	47, 10111 1040	
27 KUL 07	Number of exempt.	78 XEQ "Y"		
28 1 E3	X \$1,000	79 XEQ 11	Descel to minimum	
29 *		80 GTO "MIN	tax program	
30 "EXMPS"				
31 XEQ "Y"		81 CF 06		
32 -		82 "MIN TX"		
33 STO 02	Store taxable	83 XEQ "X"		
34 "TXABL"	income	84+LBL "F3"		
35 XEQ "V"		85 23	Reinitialize inde	
36 X=02		86 STO 07	register	
37 610 09			3	
38 CE 07		07 AEW 11	Branch to alterna	
			tive mimimum	
37 3F 23 40 VEO "TT"	Tay table adjust		tax program	
40 XEQ 11	lax table adjust-	89 CF 06		
41 SF 02		90 "AMIN TX		
42 XEQ "R"	Calculate tax	••		
43 FC? 07		91 XEQ "X"		
44 XEQ "Y"		92+LBL "F4"		
45 1.25	1.25% credit	93 24	Reinitialize inde	
46 %		94 STO 07	register	
47 FS? 07		95 RCL 27	J	
48 GTO 06		96 RCL 23		
49 RNN		97 PCI 24		
50 "1 252"		77 KUL 24		
00 1.20%		70 T		

100 "OTH TXS " 101 XEQ "X" 102 + 103 "TOTL" 104 XEQ "Y" 105 CF 08 106 XEQ "Z" 107 FS? 05 108 GTO "T1" 109 SF 25 110 GTO "FT" 111 GTO 00 112+LBL 11 113 SF 06 114 SF 25 115 .END.	Final output sub- routine Return to control program Restart page 1 Restart page 2	

REGISTERS, STATUS, FLAGS, ASSIGNMENTS³⁵

	DATA RE	GISTERS				STA	TUS		
00	Fed.taxable income	50	SIZE	028	8 TOT FIX -	. REG SCI		USER MO	DE 0FF
03	Fed. tax payable					Un	AU		
05		55	4	INIT		FL/	AGS		
			#	S/C	SET	NDICATE	S	CLEAR INDI	CATES
07	Index register		1		Automat	ic call	of		
			2		progra	<u>im "SA"</u>	ico		
10		60	<u> </u>		tor fo	r progr	iCd-		
					"TR"	n progr			
			5		First 1	evel su	b-		
					progra	um	-		
			6		Second	level s	ub-		
15		65			progra	ım			
			7		Tax tab	ole adju	st-		
					ment				
			8		Used wi	th stat	e		
					tax pr	<u>rogram</u>			
20		70	19		Access	"AI"			
			25		Error 1	gnore			
25		75							
27	Line 47 of Form								
	1040								
30		80							
35		85	 		+				
			ł						
					.	ASSIGN	IMEN	ITS	
			<u> </u>	FUNC	TION	KEY		UNCTION	KEY
40		90	†						
			ļ						
			 						
45		95	 						
			 						
			ł			 			
						1			

TAX TABLE ADJUSTMENT SUBROUTINE

Program "TT"

This program is used as a subroutine of program "P2" to adjust the amount of the taxable income bracket used by the tax table in the instructions to Form 1040. It has no other use in this package and requires the programs "TX", "TR" and "P2" for its proper running. The routine is structured as a separate program so that if the user does not desire to know the exact amount that would be shown in the table, it may be omitted and the program memory used for other purposes.

CAUTION: If the taxable income is less than \$50,000 and the user wants the program to provide the exact amount shown by the tax table, PROGRAM "TT" MUST BE USED.

	Tax Table Adjust	
01+LBL "TT"	lax lable Aujust-	
02 CF 25	merre	
035E4	Compare taxable	
04 X<>Y	income to	
05 X≠Y?	\$50,000	
06 X>Y?		
07 RTN		
08 XEQ "ZB"	Calculate Zero	
09 X<>Y	Bracket	
10 X>Y?		
11 GTO 06		
12 CLX		
13+LBL 06		
14 SF 07		
15 TAX TA		
BLE"		
16 FS? 21		
17 AVIEW		
18 FC? 21		
19 PROMPT		
20 CLD		
21 CF 02		
22 3 F3	Use \$25 bracket	
23 X>Y2	for amts below	
24 SE 02	\$3,000, \$50 for	
25 CLX	amts above	
26 25	\$3,000	
27 EC2C 02		
28 ST+ X		
29 X()Y		
30 RCL X	Adjust amt to	
31 RCL 7	center of tax	
32 MOD	table bracket	
37 -		
34 X<>Y		
35 2		
36 /		
37 +		
38 FND		
00 12021		

REGISTERS, STATUS, FLAGS, ASSIGNMENTS

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DATA REGISTERS			STATUS						
00	50		SIZE ENG DEG		3 TOT FIX - RAD	. REG SC GR	AD	USER MO 0N0	DE DFF
05	55	5		INIT		FL	AGS		
			#	S/C	SET	INDICATE	s ic T	CLEAR IND	CATES
			۷		tor fo	r progr	am		
					"TR"	i progr			
10	60		7		Tax tab	le adju	st-		
					ment				
			21		Printer	enable			
	· · · · · · · · · · · · · · · · · · ·		25		<u>Error i</u>	gnore			
15		-							
15	6	>							
					<u> </u>				
20	70)							
05									
25	/?	>							

					1				
30	80)							
25	96								
35		,							
						ASSIGN		гs	
						KEV	E		KEV
40	90)	r						
45	95	5							
—									
	<u>├</u>								
	L l	1							

SCHEDULE A (ITEMIZED DEDUCTIONS)

Program "SA"

This program steps through Schedule A to calculate the amount of itemized deductions to be entered on Line 32b of Form 1040. The key features of this program include:

- 1. Medical deduction computation The user inputs raw information, including total medical insurance premiums paid, and the program displays line-by-line entries for the deduction.
- 2. Automatic computation and storage of Adjusted Itemized Deductions for use with other programs.

Program "SA" can be executed as a subprogram of program "P2" or as a standalone. If executed independent of "P2", the following is required:

> Program "TX" must be loaded, Adjusted gross income must be stored in RO6, and the Status Code must be stored in RO8.

If "SA" is loaded and flag O1 is set, it will be called by program "P2".

Sequence of Displays During Execution:

- SCHED A Locator prompt identifying the program.
- MED INS: Gross amount of medical insurance paid during the year. (This is not a line item on Schedule A).
- LINE 1= Amount to be entered on Line 1 (1/2 of medical insurance premiums, but not more than \$150).
- DRGS: The amount spent on medicines.
- L3= The amount to be entered on Line 3 (1% of AGI).
- L4= The amount to be entered on Line 4 (excess of Line 2 over Line 3).
- L5= The amount to be entered on Line 5 (Medical insurance premiums not entered on Line 1).
- DCTRS: The amount spent on doctors, nurses and dentists.

HOSP: The amount spent on hospital bills.

TRNSP:	The amount spent on medical transportation.
OTHR:	Other medical expenses, including eyeglasses, etc.
L7=	The amount to be entered on Line 7 (total of lines 4, 5 and 6).
L8=	The amount to be entered on Line 8 (3% of AGI).
L9=	The amount to be entered on Line 9 (excess of Line 7 over Line 8).
TOT MED=	The total deduction for medical expenses.
ST.IN TX:	State and local income tax paid during the tax year.
R.E TX:	Real estate tax.
SLS TX:	Sales tax, including sales tax on motor vehicles.
OTHR:	Other taxes, including property tax.
TOT TXS=	Total deduction for taxes.
MORTG:	The interest paid on home mortgage.
CRDT CD:	The interest paid on credit cards and charge accounts.
OTHR:	Other interest paid.
TOT INT=	The total deduction for interest.
CONTRB:	Total contributions.
CSLTY:	Total casualty losses.
MISC:	Total miscellaneous deductions.
GRS DED=	The gross amount of deductions before adjustment for zero bracket amount.
STATUS:	Your filing status. This item is displayed only when this program is run independently of "P2", the status code entered in that program will be used. (This is not a line item on Schedule A).
ZBA:	The Zero Bracket Amount. This amount must be deducted from the gross amount of deductions. It is computed by the program on the basis of the filing status code entered by the user. (See Schedule A).
#NET DED=	The net amount of deductions. The amount shown has been stored in register 21 for use with program "P2".

indicates that this display is not suppressed by setting flag 04.

NOTE: The amount of Adjusted Itemized Deductions (AID) has been calculated and stored in R44 for use with other programs. Execution of the example below results in AID of zero.

EXAMPLE:

Complete the Schedule A form on the following page with the values indicated and an adjusted gross income of \$32,903.06 and a filing status of 2.

To run the example, load both programs "TX" and "SA" and set SIZE to a minimum of 045. Set flag 21 if you wish to use a printer and clear it if you do not. For this example, clear flags 03 and 04 to enable all input and output displays. This example assumes that the initial values of all inputs is zero, the display mode is FIX 2 and that flags 28 and 29 are set.

DISPLAY	KEYSTROKES	COMMENTS
	32903.06 [STO] 06 2 [STO] 08 [XEQ] "SA"	Store the adjusted gross income. Store the status. Begin execution.
SCHED A MED INS: 0.00	[R/S]* 276 [R/S] [R/S]*	Locator prompt. Enter medical insurance.
DRGS: 0.00 L3=329.03 L4=70.97 L5=138.00	400 [R/S] [R/S]* [R/S]* [R/S]*	Enter medicine expenses.
DCTRS: 0.00	589 [R/S]	Enter physician expenses.
HOSP: 0.00	237.86 [R/S]	Enter hospital expenses.
TRNSP: 0.00	22.5 [R/S]	Enter medical transportation
		expenses.
OTHR: 0.00 L7=1,058.33 L8=987.09 L9=71.24 TOT MED=209.24	[R/S] [R/S]* [R/S]* [R/S]* [R/S]*	Enter other medical expenses.
ST.IN.TX: 0.00	1291.48 [R/S]	Enter state income tax.
R.E TX: 0.00	529.66 [R/S]	Enter real estate tax.
SLS TX: 0.00	325 [R/S]	Enter sales tax.
OTHR: 0.00		Enter other taxes paid.
101 1XS=2,140.14	[K/S]^ 1556 50 [P/S]	Enton the interest paid on
MRTG: 0.00	1990.93 [K/3]	home mortgage
CRDT CD: 0.00	[R/S]	Enter interest paid on credit cards.
OTHR: 0.00 TOT INT=1.631.49	74.9 [R/S] [R/S]*	Enter other interest paid.
CONTRB: 0.00	529.5 [R/S]	Enter total contributions.

CSLTY: 0.00	900 [R/S]	Enter total casualty losses.
MISC: 0.00	232.5 [R/S]	Enter miscellaneous deductions.
GRS DED=5,648.87	[R/S]*	
ZBA=3,400.00	[R/S]*	
NET DED=2,248.87	[R/S]*	
SCHED A	_ · _	The program repeats.

 \star If flag 21 is set and the printer is attached and on, these [R/S]'s will be ignored.

				SIZE: 045
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "SA" and pack it.		[GTO]	
3	Set SIZE and desired display mode.			
4	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. (If the printer is			
	to be used, it should be set to manual			
	mode).			
5	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
6	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
7	If "SA" is not to be called as a sub-			
	program of "FT".		[CF] Ø6	
8	Begin execution.		[XEQ] "SA"	SCHED A
			[R/S]	MED INS: ()
9	Key in Medical Insurance if different from			
	displayed value.*	med ins	[R/S]	DRGS: ()
10	Key in amount spent for medicine if differ-			
	ent from displayed value. *	drugs	[R/S]	DCTRS: ()
11	Key in amount spent on doctors, dentists,			
	and nurses if different from displayed			
	value. *	doctors	[R/S]	HOSP: ()
12	Key in amount spent for hospital bills if			
	different from displayed values. *	hospital	[R/S]	TRNSP: ()

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				SIZE: 045
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
13	Key in amount spent for medical transporta-			
	tion if different from displayed value.*	trnsp	[R/S]	OTHR: ()
14	Other medical expenses, including eyeglasses			
	etc. if different from displayed value. *	other	[R/S]	ST.IN TX: ()
15	Key in amount of state and local income tax			
	paid during the tax year if different			
	from displayed value. *	st.in tx:	[R/S]	R.E. TX: ()
16	Key in amount of real estate tax if differ-			
	ent from displayed value. *	re tx	[R/S]	SLS TX: ()
17	Key in amount of sales tax including tax			
	on motor vehical if different from dis-			
	played value. *	sales tax	[R/S]	OTHR: ()
18	Key in amount of other taxes, including			
	property tax if different from displayed			
	value. *	other	[R/S]	MORTG: ()
19	Key in amount of interest paid on home			
	mortgage if different from displayed			
	value. *	mortg	[R/S]	CRDT CD: ()
20	Key in amount of interest paid on credit			
	cards and charge accounts if different			
	from displayed value. *	credit cd	[R/S]	OTHR: ()
21	Key in amount of other interest paid if			
	different from displayed value. *	other	[R/S]	CONTRB: ()
22	Key in amount of total contributions if			
	different from displayed value. *	contrb	[R/S]	CSLTY: ()
23	Key in amount of total casualty losses if			
	different from displayed value. *	casualty	[R/S]	MISC: ()

				SIZE: 045
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
24	Key in amount of total miscellaneous			
	deductions if different from displayed			
	value. *	misc	[R/S]	
25	If this program was called from program "P2"			
	it will return to "P2". If executed as			
	stand alone, go to step 7.			
	* If flag Ø3 is set, this prompt is ignored			

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01+LBL "SA"		50 "TRNSP"	
02+LDL 00			
02¥LBL 00		DI XEQ "X"	
03 " SCHED	Heading	52 +	
A "	Ū	53 "OTHR"	
04 ES2C 25		54 YEO "Y"	
05 500 01			
03 FC? 21			
Ø6 PROMPT		56 "L7"	
07 27		57 XEQ "Y"	
08 XEQ "P"	Initialize	50 001 04	3% of AGI
OO HEG THE	Tanut		8% 01 //di
07 NED 185	Input	59.03	
		60 *	
10 XEQ "X"		61 X<0?	
11 2		62 CLX	
10 /			
		63 "L8"	
13 ENTERT		64 XEQ "Y"	
14 STO 01		65 -	
15 150	\$150 comparison	66 X/02	
16 GTO T	•		
16 510 1		BY LLX	
17 -		68 "L9"	
18 X<0?		69 XEQ "Y"	
19 CLX		79 +	
20 ST+ 01		71 TOT MED	
20 571 61			
21 KUN			
22 X>Y?		72 XEQ "Y"	
23 X<>Y		73 "ST.IN.T	
24 "LINE1"	Output	X"	
25 YEO "Y"	·		
	Innut	74 XEQ "X"	
26 "DRGS"	Input	75 "R.E TX"	
27 XEQ "X"		76 XEQ "X"	
28 RCL 06	1% of AGI	77 +	
29 01		70 "010 TV"	
70			
30 *		79 XEQ "X"	
31 X(0?		80 +	
32 CLX		81 "OTHR"	
33 "L3"		82 XEQ "X"	
74 XEO "Y"		97 +	
76			
33 -		84 101 185	
36 X(0?			
37 CLX		85 XEQ "Y"	
38 "L4"	Outputs	86 +	
39 XEQ "Y"		97 "MORTC"	
40 DCL 01			
40 RUL 01		88 XEQ "X"	
41 "L5"		89 "CRDT CD	
42 XEQ "Y"		**	
43 +		90 XF0 "X"	
44 "NCTPS"	Inputs	91 +	
AE VEO "V"	TUhurz		
43 AEW "A"		92 "UTHR"	
46 +		93 XEQ "X"	
47 "HOSP"		94 +	Store for adjust-
48 XEQ "X"		95 STO 01	ed itemized
49 +		92 "TOT INT	deductions
· · · ·		76 IUI INI	

97 XEQ "Y" 98 + 99 "CONTRB" 100 XEQ "X" 101 ST+ 01 102 + 103 "CSLTY" 104 XEQ "X" 105 + 106 "MISC"	Store for aid	
107 XEQ "X" 108 ST+ 01 109 +	Store for aid	
110 STU 21 111 RCL 01 112 - 113 RCL 06 114 X<0? 115 GTO 14 116 X<>Y 117 - 118 .6 119 * 120 RCL 01 121 X<>Y 122 - 123+LBL 14	Calculate aid	
124 X<0? 125 CLX 126 STO 44 127 RCL 21 128 "GRS DED	Store aid	
129 XEQ "Y" 130 XEQ "ZB" 131 "ZBA" 132 XEQ "Y" 133 - 134 X<0?	Calculate Zero Bracket amt	
135 CLX 136 STO 21 137 "NET DED "	Store net item- ized deductions	
138 XEQ "V" 139 FC?C 06 140 GTO 00 141 ADV 142 GTO "F1" 143 .END.	Restart Return to 1040 page 2 program	

REGISTERS, STATUS, FLAGS, ASSIGNMENTS

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	DATA REGISTERS			STATUS						
00 01	Scratch	50		SIZE ENG DEG		5 TOT FIX RAD	. REG SC GR	AD	USER MO ON (DE DFF
05		55		#		eet	FLA	AGS		CATES
		· · · · · ·		 6	3/0	Second	level s	ub- T	CLEAN IND	CATES
						progra	im	u.,		
				21		Printer	[•] enable			
10		60		25		Error i	gnore			
						+				
15		65					****			
		70								
20	Not doductions	70								
25		75								
30		80								
-25		95								
35		05								an a
					L		ASSIGN	IMEN	TS	
					FUNC	TION	KEV			KEV
40		90			0.10					
44	Adjusted itemized									
15	deductions	05					 			
43		90								
							<u> </u>			

SCHEDULE G (INCOME AVERAGING)

Program "SG"

"SG" determines whether the taxpayer is eligible to compute his tax by the income averaging method, and if so, computes it on that basis, compares it to the computed tax without averaging, and selects the lower of the two.

This program can be executed as a subprogram of program "P2" or it can be used on its own. If executed alone, the following is required:

- 1. programs "TX" and "TR" must be loaded,
- 2. taxable income must be stored in RO2,
- 3. tax (from tax rate schedules) on taxable income must be stored in RO3, and
- 4. the status code must be stored in RO8.

"SG" is equipped with the auxiliary global label "AT" that identifies the program as one of the three alternative tax computation programs. Label "AT", is used by program "P2" (page 2 of Form 1040) to automatically call an alternative tax computation subprogram if flag 00 is set.

Sequence of displays during execution:

- SCHED G Locator prompt identifying the program.
- LINE 12: Amount which should be entered on Line 12 of Schedule G. This amount is calculated from previous years' tax information and, once computed, is a constant for any taxpayer in a given year.
- L13= Line 13. Line 10 less Line 12. "NO GOOD". This display signifies that the amount of income is too small to permit the use of income averaging. This display does not appear if taxpayer qualifies for income averaging.
- L15 Line 15. 20% of Line 13.
- NOTE: The program does not display an amount for Line 14. Line 14 is the same as Line 12.
 - 16,18= Lines 16 & 18. Total of Lines 14 & 15.
 - 19,20= Lines 19 & 20. Tax on amount on Lines 16 and 18.

- L21= Line 21. Tax on amount on Line 14. L22= Line 22. Line 20 less Line 21. L23= Line 23. Line 22 x 4. L27= Line 27. Total of Lines 19 & 23. 1.25%= 1.25% of the amount on Line 27. # GTAX= Tax determined by income averaging. # L0 TX= Lower of:
 - a) tax without averaging, and
 - b) tax determined by averaging.

This output is not suppressed by the setting of flag 04.

NOTE: This program assumes that excess community income (line 9) and certain amounts received by owner-employees (line 7) are zero.

To use "SG" as a subprogram in program "P2":

- 1. Run program "P2".
- 2. Load "SG" when prompted, "Load ALT TAX"

To use "SG" with tax rate schedule program "TR":

- 1. Place the amount of taxable income in the X register.
- 2. [XEQ] "TR"
- 3. [XEQ] "SG"

EXAMPLE:

Fill out the Schedule G form on the following page using program "TR" to store the required values for "SG" (see the instructions for "TR" for details). Take the taxable income to be \$38,000 and the filing status to be 1.

Load programs "TX", "TR" and "SG". Set the status of flag 21 to match the printer status: printer exists and is on - set flag 21, printer does not exist or is off - clear flag 21. Clear flags 03 so as to allow all input displays to be seen. Set flag 04 to avoid the intermediate line values, generating only the "bottom line" value. Since, in this case, "SG" is not being called from "P2", flag 06 must be cleared. This example assumes that flags 28 and 29 are set, that the display format is FIX 0, and that the initial values for STATUS and LINE 12 are zero.

DISPLAY	KEYSTROKES	COMMENTS
STATUS: 0. TAX=11,531. SCHED G LINE 12: 0. GTAX=10,822. L0 TX=10,822	38000 [XEQ] "TR" 1 [R/S] [XEQ] "SG" [R/S] 25200 [R/S] [R/S]*	Enter the taxable income. Calculate the tax. Filing status is 1. Find Schedule G tax. Locator prompt. Enter Line 12 value. Schedule G tax. The lower of the two calculated taxes.

* Not needed if flag 21 is set and a printer is attached and on.

				SIZE: 009
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and "TR" and pack them.		[GT0]	
2	Load program "SG" and pack it.		[GTO]	
3	Set SIZE and desired display mode.			
4	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to manual			
	mode).			
5	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
6	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
7	If "SG" is not being called from "P2"		[CF] Ø 6	
8	If "SG" is not being called from "P2"			
	key in: taxable income in register Ø2;	taxable income	[STO] Ø2	
	tax (from schedule) on taxable income in	tax on tax- able income	[STO] Ø3	
	register Ø3; status code in register Ø8.	status code	[STO] Ø8	
9	Begin execution.		[XEQ["SG"	SCHED G
10	Note locator prompt and continue. (If			
	called from "P2", execution will continue			
	from this point, [R/S] will not be			
	performed if printer attached and flag 21			
	is set).			
11	Key in amount for line 12 if different			
	from display.		[R/S]	L13= ()

				SIZE: 009
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
12	Note display of line 13 - averageable income		[R/S]#	NG or
				L15= ()
13a	If "NG" appears in the display, amount of			
	income is too small for income averaging.		[R/S]#	LO TX= ()
13b	Note display of tax. If this program was			
	called by program "P2", it will now re-			
	turn to "P2". If not, will return to			
	step 9.			CRDTS: ()
				or SCHED G
14	If "LIS= ()" appears in the display;			
	note amount calculated for line 15. **		[R/S]#	16, 18= ()
15	Note amount for lines 16 and 18. **		[R/S]#	19, 20= ()
16	Note amount for lines 19 and 20. **		[R/S]#	L21= ()
17	Amount for line 21. (Tax on amt. on line			
	14). **		[R/S]#	L22= ()
18	Amount for line 22. **		[R/S]#	L23= ()
19	Amount for line 23. **		[R/S]#	L27= ()
20	Amount for line 27. **		[R/S]#	1.25%= ()
21	Displays amount for line 28. **		[R/S]#	GTAX= ()
22	Displays the tax determined by income			
	averaging.		[R/S]#	LO TX= ()
23	Displays the lower of tax without averag-			
	ing or tax determined by income			
	averaging.		[R/S]#	CRDTS: ()
				or SCHED G
24	If this program was called by program "P2",			
	it will now return. If not, will return			

				SIZE: 009
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	to step 9.			
	# If flag 21 is set and the printer attack * If flag Ø3 is set, this prompt is ignore	hed, this [ed.	R/S] will not be	performed.
	** If flag Ø4 is set and flag 21 clear, th	is display	will be omitted.	

Ø1+LBL "SG"		51 *	
02AL PL "OT"		52 "127"	
03+LBL 00		53 XEQ "1"	
04 " SCHED	Heading	54 +	
6"	neuding	55 "L27"	
05 5000 25		54 450 "4"	
0J F3:0 2J			1 25% credit
06 FC? 21		57 1.25	1.25% Credit
07 PROMPT		58 %	
08 3		59 "1.25%"	
	_		
	Initialize	00 AC& 1	
10 RCL 02		61 -	
11 "LINE12"		62 "GTAX"	
12 XEQ "X"		63 XEQ "V"	
17 -		CAAL DI 10	
13 -			Regular tax
14 "L13"		65 RUL 03	
15 XEQ "Y"		66 X>Y?	Select lower of
16 3 E3	\$3.000 test	67 X<>Y	regular and
17 9/-92	Test nassed	60 CTO 07	sched G taxes
	Tost failed		
18 GIU 06	lest latted	69 "LU IX"	
19 "NG"		70 XEQ "V"	
20 FS? 21		71 FC?C 06	
21 OVIEW		72 GTO 00	Restart
22 FU? 21		73 HUV	$\mathbf{D}_{\mathbf{a}}$
23 PROMPT		74 GTO "F2"	
24 RCL 03		75 .END.	page 2 program
25 GTO 10			
26+LBL 00			
27 RDN			
28.2			
29 *			
70 -115-			
30 113			
31 XEQ "Y"			
32 RCL 04			
33 +			
74 "16.18"			
35 AEQ 1			
36 SF 02			
37 XEQ "R"	Use tax rate		
38 "19.20"	schedules		
	•••••		
40 RCL 04			
41 SF 02			
42 XEQ "R"	Use tax rate		
47 "1 21"	schedules		
	0011044100		
44 XEU "1"			
45 RCL Y			
46 X<>Y			
47 -			
40			
40 L22			
49 XEQ "Y"			
50 4			

REGISTERS, STATUS, FLAGS, ASSIGNMENTS

	DATA RE	GIS	TERS				STA	TUS		
00	Fed. tax payable	50		SIZE ENG DEG	OC	<u>)9</u> TOT — FIX - — RAD	. REG SCI GR		USER MC 0	DDE OFF
05		55			INIT		FL/	AGS		
				#	S/C	SET	INDICATES	S	CLEAR IND	ICATES
				2		Subrout	<u>ine ind</u>	<u>ica-</u>		
							n progr			
10		60		6		Second	level s	ub-		
						progra	Im			
				21		Printer	<u>enable</u>			
				25		Error 1	gnore			
15		65								
		00								
20		70								
25		75								
30		80					an dan ar dalam wata kata ma			
25		85								
- 55		- 00								
							ASSIGN	IMEN	TS	
					FUNCT		KEY	F	UNCTION	KEY
40		90								
45		95								
							 			

SCHEDULE D (CAPITAL GAINS AND LOSSES)

Program "SD"

This program calculates the capital gains deduction (CGD) and the amount of capital gain or loss to be reported on Form 1040, page 1. This program may be executed as a subprogram of program "FT" or may be executed independently. Program "TX" must also be loaded before execution of "SD". If "SD" is run independently, the Status code must be stored in R08.

Program "DL" may be used with this program to calculate the amount of short-term or long-term loss carry over. If program "DL" is present, it will be automatically called and executed as a subprogram of "SD"

Sequence of displays during execution:

	SCHED D	Locator prompt identifying the program.
	NLTG:	Net Long-Term Gains or Losses. Line 7 (enter loss as a negative).
	NSTG:	Net Short=Term Gains or Losses. Line 18 (enter loss as a negative).
	19=	Line 19. Lines 7 & 18 combined.
	20=	Line 20. See Schedule D.
	CGD=	Capital Gain Deduction. Line 21. (60% of amt on Line 20).
	22=	Line 22. Capital Gain to be reported on Form 1040.
	23=	Line 23. See Schedule D.
	24=	Line 24. Capital Loss to be reported on Form 1040.
#	SD INC=	Schedule D Income. Gain from Line 22 of Loss from Line 24. This amount will be stored in register 16 for use in the Form 1040 program ("FT").

The capital gain dividend (CGD) is or will be stored in R47 for use with other programs.

NOTE: This program assumes that adjusted taxable income is at least \$3,000 (\$1,500 if filing status 3 is used). See Schedule D, Line 24.

EXAMPLE:

Calculate the Schedule D income based on net long-term gains of \$4,413.75, net short-term gains of -\$933.75 and filing status of 2.

Programs "TX" and "SD" must be loaded and SIZE set to a minimum of 048. Set the status of flag 21 to agree with that of the printer: printer attached and on - set flag 21, printer not attached or off - clear flag 21. Set flags 03 and 04 so that all displays will be viewed. Since "SD" is not being called from "FT", clear flag 06.

This example assumes that the initial values of NSTG and NLTG are zero, that the display mode is FIX 2 and that flags 28 and 29 are set.

DISPLAY	KEYSTROKES	COMMENTS
	2 [STO] 08 [XEQ] "SD"	Store the filing status. Begin execution.
NSTG: 0.00	[R/S] -933.75 [R/S]	Locator prompt. Enter net short-term
NLTG: 0.00 19=3,480.00	4413.75 [R/S] [R/S]	gains (loss in this case). Enter net long-term gains. Line 19.
20=3,480.00 CGD=2,088.00	[R/S] [R/S]	Line 20. Capital Gain Deduction.
22=1,392.00 SD INC=1,392.00	[R/S]	Line 22. Schedule D income.

				SIZE: 048
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "SD" and pack it.		[GTO]	
3	Set the appropriate SIZE and the desired			
	display mode.			
4	Load "DL" if you desire.			
5	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off or nonexistent -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			-
	to be used, it should be set to manual			
	mode).			
6	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
7	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
8	If "SD" is not to be called as a sub-			
	program of "FT"		[CF] Ø6	
9	Begin execution.		[XEQ] "SD"	SCHED D
10	Note the locator prompt and continue.		*****	
	(If "SD" were called from "P2", execution			
	would continue at this point).		[R/S]#	NSTG: ()
11	Key in net short-term gains if different			
	from the displayed value. *		[R/S]	NLTG: ()
12	Key in net long-term gains if different			
	from the displayed value. *		[R/S]	19= ()
13	See the value for line 19 and continue.**		[R/S]	20= ()

				SIZE: 048
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
14	See the value for line 20 and continue.**		[R/S]	CGD= ()
15	See the value of the capital gains deduction			
	and continue.		[R/S]#	22= ()
				or 23= ()
16a	If the display shows "22= ()", record this			
	value on line 22 of Schedule D. Press			
	[R/S] to continue. If program "DL" has			
	been loaded, control will be passed to			
	it and returned at step 17. If "DL" has			
	not been loaded, go to step 17.			
16b	If the display shows "23= ()", record its			
	value and continue.		[R/S]	24= ()
	Note the value of line 24. At this time,			
	if program "DL" is loaded, control will			
	be passed to it and returned. Refer to			
	program "DL" User Instructions for			
	details of its execution.		[R/S]	SD INC=
17	Record Schedule D income and continue.		[R/S]#	SCHED D
				or SCH E: ()
18a	If "SD" has been called from "FT", control			
	will be passed back at this time. Refer			
	to "FT" Users Instructions for further			
	information.			
18b	If "SD" has not been called from "FT", the			
	program is recycled. Go to step 10.			
	# If flag 21 is set and the printer attach	ed, this [R/S] will not be	e performed.
	** If flag Ø4 is set and flag 21 clear, thi	u. s display	will be omitted.	

01+LBL "SD"		512	
02+LBL 00		52 /	
07 " SCHED	Heading	53 +	
Du Scheb	neading	5441 BL 07	
D			
04 FS?C 25		JO ENTERT	
05 FC? 21		56 "23"	
AL PROMPT		57 XEQ "Y"	
00 1 Kom 1		59 _7 57	
07 44	Initializa		
08 XEQ "P"	Inicialize	59 GIU IND	
09 "NSTG"	Inputs	08	
10 XEO "X"		60+LBL 03	
		61 2	
II "NLIG"			
12 XEQ "X"		62 /	
13 +		63+LBL 05	
14 970 01		64+LBL 04	
		65AL BL 01	
15 19			
16 XEQ "Y"		66+LBL 02	
17 ENTER1		67 X<>Y	
18 8/02		68 STO 16	Store sched D
		69 "24"	income
19 610 06			
20 RCL 46		70 X21?	
21 X<0?		71 GTO 08	
22 CLX		72 X<>Y	
		73 STO 16	Store sched D
23 6/11			income
24 RUN		74VLDL 00	meonie
25 "20"		75 XEQ "Y"	
26 XEQ "Y"		76 SF 25	
27 6		77 XEQ "DL"	Branch to loss
		78 PCL 16	carry over prog
28 *			Display sched D
29 STU 47	Store capital	77 5D INC	income
30 "CGD"	gain deduction	80 XEQ "V"	
31 XEQ "V"		81 FC?C 06	
72 -		82 GTO 00	Restart
	Store sched D	87 ONV	Nestar t
33 510 16	income		$D_{atum} = 1040$
34 "22"	meome	84 GIU FH	Return to 1040
35 GTO 08		85 .END.	program
36+LBL 06			
ST RUE 45			
38 X<0?			
39 GTO 06			
40 RDN			
41 2			
42 /			
43 GTO 07			
44+LBL 06			
45 RCI 46			
A6 9/02			
40 010:			
47 GIU 06			
48 RCL 01			
49 GTO 07			
50+1 BL 06			
JOYLDL 00	-		

REGISTERS, STATUS, FLAGS, ASSIGNMENTS

DATA REGISTERS		STATUS								
00 01	Scratch	50		SIZE ENG DEG	04	- <u>8</u> FIX - RAD	. REG SCI GR	AD	USER MOI ON C	DE IFF
05		55			INIT	0.57	FL/	AGS		0.1750
				#	5/C	SEI		5 	CLEAR INDI	CATES
08	Status information			0		progr	am	sub-		
10		60		21		Frinte	r enable ignore	e		
						21101	rgnore			
15		65								
16	<u>Schedule D income</u>									
20		70								
25		75								
30		80								
		05								
35		60							······································	
					I		ASSIGN	IMEN	TS	
					FUNCT	ΓΙΟΝ	KEY	F	UNCTION	KEY
40		90								
45		05								
		90								
47	Capital gains									
	deduction						 			

SCHEDULE D, PART V (CALCULATION OF CAPITAL LOSS CARRY OVER)

Program "DL" (Subprogram of "SD")

Program "DL" calculates the amount of any short-term or long-term capital loss carry over. If this program is present, it is automatically executed when program "SD" is run and is executed only as a subprogram of "SD". Program "TX" must be loaded before execution of "DL".

Sequence of displays during execution:

This program has no locator prompt.

	36=	Line 36.
	37=	Line 37.
	38=	Line 38.
	39=	Line 39.
	40=	Line 40.
#	STCO=	Short-term capital loss carry over.
	42=	Line 42.
	43=	Line 43.
	44=	Line 44.
	45=	Line 45.
	46=	Line 46.
#	LTCO=	Long-term capital loss carry over.

This display is not suppressed by the setting of flag 04.

EXAMPLE:

Calculate Schedule D income using the capital loss carry over program ("DL"). Take the net long-term gains to be -\$8,700, the net short-term gains to be \$238 and the filing status to be 2.

Programs "TX" and "SD" must be loaded and SIZE set to a minimum of 048. Flags 03, 04 and 06 should be clear and flag 21 should match the status of the printer (see instructions for "SD"). The example assumes that the initial values for NSTG and NLTG are zero, that the display mode is FIX 0 and that flags 28 and 29 are set.

KEYSTROKES	COMMENTS
2 [STO] 08 [XEQ] "SD"	Store filing status.
[R/S] 238 [R/S] -8700 [R/S]	Net gains.
[R/S] [R/S]	
[R/S] [R/S]	
[R/S] [R/S]	
[R/S] [R/S]	
[R/S]	Long-term capital lo Schedule D income.
	KEYSTROKES 2 [STO] 08 [XEQ] "SD" [R/S] 238 [R/S] -8700 [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S]

ital loss carry over. come.

				SIZE: 048
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	Since "DL" is not intended for stand-alone			
	use, these instructions assume that			
	control has been passed to "DL" from "SD".			36= ()
1	Note the value from line 36 and continue.**		[R/S]	37= ()
2	Note the value from line 37 and continue.**		[R/S]	38= ()
3	Note the value from line 38 and continue.**		[R/S]	39= ()
4	Note the value from line 39 and continue.**		[R/S]	40= ()
5	Note the value from line 40 and continue.**		[R/S]	STCO= ()
6	Note the short-term capital loss carry			
	over and continue.		[R/S]#	42= ()
7	Note the value from line 42 and continue.**		[R/S]	43= ()
8	Note the value from line 43 and continue.**		[R/S]	44= ()
9	Note the value from line 44 and continue.**		[R/S]	45= ()
10	Note the value from line 45 and continue.**		[R/S]	46= ()
11	Note the value from line 46 and continue.**		[R/S]	LTCO= ()
12	Note the long-term capital loss carry			
	over and continue.		[R/S]	
13	At this point, control is passed back to			
	program "SD".			
	** If flag Ø4 is set and flag 21 clear, th	is display	will be omitte	d.
	# If flag 21 is set and the printer attack	ned, this [R/S] will not	be performed.

01+LBL "DL" 02 CF 25 03 CLX 04 STO 01 05 RCL 45 06 X>0? 07 CLX 08 "36" 09 XEQ "Y" 10 X=0? 11 GTO 06 12 RCL 46 13 X<0? 14 CLX 15 "37" 16 XEQ "Y" 17 + 18 ENTER† 19 "38" 20 XEQ "Y" 21 RCL 16 22 "39" 23 XEQ "Y" 24 X <y? 25 RDN 26 STO 01 27 "40" 28 XEQ "Y" 29 - 30 "STCO" 31 XEQ "Y" 32+LBL 06 33 RCL 16 34 RCL 01 35 - 36 STO 01 37 "42" 38 XEQ "Y" 39 RCL 46 40 X>0? 41 CLX 42 "43" 43 XEQ "Y" 44 X=0? 45 GTO 06 46 RCL 45 47 X<0? 40 Y Y"</y? 	Calculation of loss carry over	52 "45" 53 XEQ "Y" 54 RCL Ø1 55 2 56 * 57 "46" 58 XEQ "Y" 59 - 60*LBL Ø6 61 "LTCO" 62*LBL Ø8 63 XEQ "V" 64 .END.	Return to sched program
40 GIU 06 46 Dri 45			
46 KUL 40 47 8702			
47 X507 40 C17			
48 ULX 19 "11"			
47 44 50 VEN "V"			
51 +			

REGISTERS, STATUS, FLAGS, ASSIGNMENTS⁶⁷

DATA REGISTERS		STATUS							
00 01	Scratch	50	SIZE ENG DEG	48	3 TOT FIX - RAD	. REG SC GR	I AD	USER MO ON C 	DE)FF
05		55	# 25	INIT S/C	SET Error i	FLA INDICATE	AGS s	CLEAR INDI	CATES
10		60							
15		65							
20		70							
25		75							
30		80							
35		85				ASSIGN		TS	
40		90		FUNCT	TION	KEY	F		КЕҮ
45		95							

ALTERNATIVE TAX COMPUTATION FROM SCHEDULE D

Program "DT"

This program makes the alternative tax computation provided for in Part IV of Schedule D.

Programs "TX" and "TR" must be loaded before execution of "DT". Program "DT" may be executed as a subprogram of program "P2" or may be executed independently. If executed independently, the following data is needed:

in	R02:	Taxable Income
in	R03:	Tax rate schedule tax on taxable income
in	R08:	Status code
in	R47:	Capital Gain Deduction (CGD)

NOTE: The Schedule D alternative tax may be computed by income averaging (see line 33, Schedule D). "SG" (the income averaging program) can be used to compute this. Substitute the amount on line 32 of Schedule D for line 6 of Schedule G. After computation, compare this amount with the tax on line 33 of the "DT" program and choose the lower. Enter on line 33 and complete lines 34 and 35. This is the Schedule D alternative tax.

Sequence of displays during execution:

SCH D TAY

SCH D TAX	Locator prompt identifying the program.
81 STG:	Short-term capital gains or losses after 6/9/81. (enter loss as a negative).
81 LTG:	Long-term capital gains or losses after 6/9/81. (enter loss as a negative).
27=	Line 27.
NG=	"NO GOOD". Line 27 is zero or less and taxpayer may not use this method of computing tax.
28=	Line 28.
29=	Line 29.
30=	Line 30.
31=	Line 31.
32=	Line 32.
TRS=	Tax rate schedule tax on amt on Line 32 before 1.25% credit.
- 1.25% of TRS amount. (These two items are not line items on Schedule D).
- 33= Line 33. Tax on amount on Line 32 after 1.25% credit.

34= Line 34.

- # DTAX= Alternative Tax from Part IV of Schedule D.
- # LO TX= Lower of:
 - a) Schedule D alternative tax, and
 - b) Tax rate schedule tax on taxable income.

This display is not suppressed by the setting of flag 04.

To use "DT" as a subprogram in "P2":

- 1. Run program "P2".
- 2. Load "DT" when prompted "LOAD ALT TAX".

To use "DT" as a stand-alone with tax rate schedule program "TR":

- 1. Store the amount of the Capital Gain Dividend in register 47. (This amount may already be present from an earlier run of program "SD").
- 2. Place the amount of taxable income in the X register.
- 3. [XEQ] "TR"
- 4. [XEQ] "DT"

EXAMPLE:

Taking the capital gain deduction to be \$13,500, taxable income to be \$84,957 and filing status to be 2, find the Schedule D tax.

Programs "TX", "TR" and "DT" must be loaded, and SIZE set to at least 051. Set the status of flag 21 to correspond to the state of the printer: printer attached and on - set flag 21, printer off or not attached - clear flag 21. For this example, clear flag 03 (to allow input prompts) and set flag 04 (to omit the intermediate results). Since "DT" will not be called from "P2", clear flag 06. This example assumes that the initial values for STATUS, 81 STG, and 81 LTG are zero, that the display format is FIX 0, and that flags 28 and 29 are set.

DISPLAY	KEYSTROKES	COMMENTS
	13500 [STO] 47 84957 [XFO] "TR"	Store CGD. Enter taxable income and continue.
STATUS: 0. TAX=32,741. SCH D TAX 81 STG: 0. 81 LTG: 0.	2 [R/S] [XEQ] "DT" [R/S] [R/S] 42300 [R/S]	Enter status. Calculate schedule D tax. Locator prompt. Net gains.
DTAX=32,441. LO TAX=32,441	[R/S]*	Schedule D tax. The lower of the two computed taxes.

* Omitted if flag 21 is set and the printer is present and turned on.

				SIZE: 051
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GT0]	
2	Load program "TR" and pack it.		[GTO]	
3	Load program "DT" and pack it.		[GT0]	
4	Set SIZE and desired display mode.			
5	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set in manual			
	mode).			
6	To suppress input prompts -		[SF] Ø3	
	To allow input prompts		[CF] Ø3	
7	To suppress output prompts -		[SF] Ø4	
	To allow output prompts -		[CF] Ø4	
8	If "OT" is not to be called from program			
	"P2"		[CF] Ø6	
9	If "DT" is not called from "P2", key in:	touch 1 a		
	taxable income in register Ø2; tax (from	income	[STO] Ø2	
	schedule) on taxable income in register	able incom	e [STO]Ø3	
	Ø3; status code in register Ø8; capital	status code	[STO] Ø8	
	gain deduction in register 47.	CGD	[STO] 47	
10	Begin execution.		[XEQ] "DT "	SCH D TAX
11	Note locator prompt and continue. (If			
	called from "P2", execution will continue			
	from this point. If flag 21 is set and			
	"DT" has been called from "P2", this			

				SIZE: 051
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	[R/S] will be passed)		[R/S]	81 STG: ()
12	Key in short-term capital gains after	short-		
12	06/00/21 if different from display *	capital	Γρ/ς]	81 JTG• ()
12	Vey in long term conital gains after	long-		
15	Rey in long-term capital gains after	capital		07 ()
	06/09/81, if different from display. *	gains	[K/S]	2/= ()
14	Note amount for line 27. **		[R/S]	NG
				or 28= ()
15a	If "NG" appears on the display, this			
	method of tax computation may not be used.		[R/S]	LO TX= ()
15b	Note display of tax. If this program was			
	called by program "P2", it will now			
	return to "P2". If not, will return to			
	step 10.		[R/S]#	CROTS: ()
				or SCH D TAX
16	If "28= ()" appears in the display:			
	note amount for line 28.**		[R/S]	29= ()
17	Note amount for line 29. **		[R/S]	30= ()
18	Note amount for line 30. **		[R/S]	31= ()
19	Note amount for line 31. **		[R/S]	32= ()
20	Note amount for line 32. **		[R/S]	TRS= ()
21	Displays tax rate schedule tax on line 32			
	before 1.25% credit. Is not a line			
	item. **		[R/S]	1.25%= ()
22	Displays 1.25% of TRS amount. Is not			
	a line item. **		[R/S]	33= ()
23	Note amount for line 33. **		[R/S]	34= ()
24	Note amount for line 34. **		[R/S]	DTAX= ()

				SIZE: 051
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
25	This is amount of tax calculated by part			
	IV Schedule D. (line 35).		[R/S]#	LD TX= ()
26	Displays the lower of: tax rate schedule			
	tax, or Schedule D alternative tax.		[R/S]#	CROTS: ()
				or SCH D TAX
27	If this program was called by program "P2",			
	it will now return. If not, will go to			
	step 10.			
	# If flag 21 is set and the printer attack * If flag Ø3 is set, this prompt is ignored	ed, this [d.	R/S] will not b	e performed.
	** If flag Ø4 is set and flag 21 clear, thi	s display	will be omitted	•

Program Listings

GIAL PL "DT"			
		57 *	
04 " SCH D		54 - 71 -	
TAX"	Heading	55 VEO "V"	
05 ES2C 25		54 -	
06 EC2 21		57 8/02	
07 PROMPT		50 CLV	
08 47		50 CEA 59 "72"	
И9 XFQ "Р"	T	60 XEO "Y"	
10 "81 STG"	Initialize	61 SE 02	
11 XEQ "X"	Inputs	62 XEO "P"	Use tax rate
12 "81 LTG"		67 XEQ "Y"	schedules
13 XEQ "X"		64 1 25	1 25% credit
14 STO 01		65 7	1.25% create
15 +		66 "1.25%"	
16 X<0?		67 XEQ "Y"	
17 0		68 -	
18 RCL 01		69 "33"	
19 X<0?		70 XFQ "Y"	
20 CLX		71 RCL Y	
21 X>0?		72 5	
22 RDN		73 /	
23 "27"		74 "34"	
24 XEQ "Y"		75 XEQ "Y"	
25 X>0?	Test for_positive	76 +	
26 GTO 06	amt on line 27	77 "DTAX"	
27 "NG"	lest passed	78 XEQ "V"	
28 FS? 21	lest lalled	79 RCL 03	Regular tax
29 AVIEW		80 X>Y?	Select lower of
30 FC? 21		81 X<>Y	regular and
31 PRUMPI		82 STO 03	sched D Laxes
32 RCL 03		83+LBL 10	
33 610 10		84 "LO TX"	
34 TEL 06		85 XEQ "V"	
30 KUL 01 77 VIV0		86 FC?C 06	
30 8/12		87 GTO 00	Restart
37 AN/1 70 #30#		88 HDV	
30 20 79 VEN "V"		89 GIU "F2"	
40 PCI 47		90 .END.	Return to 1040
41 6			page 2 program
42 /			
43 X>Y2			
44 X<>Y			
45 STO 50	Stopp ant an		
46 "29"	Jine 20		
47 XEQ "Y"			
48 RCL 02			
49 "30"			
50 XEQ "Y"			

REGISTERS, STATUS, FLAGS, ASSIGNMENTS⁷⁵

	DATA RE	EGIS	TERS				STA	TUS		
00 01 03	Scratch Fed. tax payable	50	Line 29 Schedule D	SIZE ENG DEG		L TOT. FIX RAD	REG SCI GR	AD	USER MOI ON C	DE)FF
05		55					FL/	AGS		
		1.00		#	INIT S/C	SET IN	DICATE	S	CLEAR INDI	CATES
				2		Subrouti	ne ind	ica-		
						tor for	progr	am		
10		60		6		Second 1	evels	ub-		
						program		ub		
				21		Printer	enable			
				25		<u>Error ig</u>	nore		·····	
15		65								
15		05								
20		70								
25		75								
30		80								
35		85								
						Α	SSIGN	IMEN	TS	
				F	UNCI	ΓΙΟΝ	KEY	F	UNCTION	KEY
40		90								
45		95								
							i			

COMPUTATION OF MAXIMUM TAX (FORM 4726)

Program "MAX"

"MAX" calculates maximum tax based on personal service income. It may be executed as a subprogram of "P2" or may be run independently. If executed independently, the following data is required:

> in R02: Taxable Income. in R03: Tax rate schedule tax on taxable income. in R06: Adjusted Gross Income. in R08: Status code. in R44: Adjusted Itemized Deductions. (AID) in R50: Amount on Line 29, Schedule D. (Used only if using subroutine "AMX").

Programs "TX" and "TR" are also needed to run this program.

When this program is used interactively with program "P2", Line 13 of the maximum tax uses the tax previously determined. This tax will be updated and changed by the alternate tax computations if they are found to be lower than the regular tax. As a result, the maximum tax program must be run first if it and one or more of the other alternate taxes are loaded and run as part of the "P2" program.

If the optional subprogram "AMX" is loaded and, if there is a value in register 50 (Line 29, Schedule D), "AMX" will be called by "MAX". If it is called but is not present, "NONEXISTENT" will appear in the display.

Sequence of displays during execution:

ΜΑΧ ΤΑΧ	Locator prompt identifying the program.
PSNI:	Personal Service Net Income. Line 3.
AGI=	Adjusted Gross Income. Line 4.
PCT=	Amount on Line 3 divided by amount on line 4; expressed as a percent.
L6=	Line 6. Taxable income.
L7=	Line 7. Line 6 x Line 5.
AID=	Adjusted Itemized Deductions.
OTH PRF:	Total tax preference items other than Adjusted Itemized Deductions and Capital Gain Deduction. (These last two items are not line items on this form).

TOTL:	Total preferences used for this form. Line 8.					
PSTI:	Personal Service Taxable Income. Line 9.					
10=	Line 10. See Form 4726.					
11=	Line 11. Line 9 less Line 10.					
12=	Line 12. 50% of Line 11.					
13=	Line 13. Tax on amount on Line 6.					
14=	Line 14. Tax on amount on Line 9. (PSTI)					
15=	Line 15. Line 13 less Line 14.					
16=	Line 16. See Form 4726.					
17=	Line 17. Total of Lines 15 & 16.					
1.25%=	1.25% of Line 17.					
19=	Line 19. Total of Lines 17 & 18.					
20=	Line 20.					
# MAX TAX=	Manimum Tax.					
# LO TX=	Lower of: a) Maximum tax, and b) Tax rate schedule tax on taxable income.					

Setting flag 04 does not suppress this output.

To use this program with tax rate schedule program "TR":

- 1. Check that the appropriate values are present in registers 06, 08, 44, 47, and 50 (see previous data list).
- 2. Place the amount of taxable income in the X register.
- 3. [XEQ] "TR".
- 4. [XEQ] "MAX".
- EXAMPLE: See the example for "AMX".

				SIZE: 055
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GT0]	
2	Load program "TR" and pack it.		[GT0]	
3	Load program "MAX" and pack it.		[GT0]	
4	Set SIZE and desired display mode.			
5	Load optional subprogram "AMX" and pack			
	if desired.			
6	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to manual			
	mode).			
7	To suppress input prompts -		[SF] Ø3	
	<u>To allow input prompts -</u>		[CF] Ø3	
8	To suppress output prompts -		[SF] Ø4	
	To allow output prompts -		[CF] Ø4	
9	If "MAX" is not to be called from			
	program "P2".		[CF] Ø6	
10	If not called from "P2" key in: taxable			
	income in register Ø2; tax (from schedule)			
	on taxable income in register Ø3, ad-			
	justed gross income in register Ø6;	taxable income	[STO] Ø2	
	status code in register Ø8; adjusted	tax on tax able incom	- le [STO]Ø3	
	itemized deductions in register 44;	AGI	[STO] Ø6	
	capital gain deduction in register 47.	status code	[STO] Ø8	
	If using subroutine "AMX", key in	AID	[STO] 44	

				SIZE: 055
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	amount on line 29. Schedule D in	CGD	[STO] 47	
	register 50.	line 29 sched D	[STO] 50	
11	Begin execution.		[XEQ] "MAX"	ΜΑΧ ΤΑΧ
12	Note locator prompt and continue. (If called	ł		
	from "P2", execution will continue from			
	this point. If flag 21 is set and "MAX"			
	has been called from "P2", this [R/S]			
	will be passed).		[R/S]	PSNI: ()
13	Key in personal service net income *			
	if different from display.		[R/S]	AGI= ()
14	Displays adjusted gross income.**		[R/S]	PCT= ()
15	Displays result needed on line 5.**		[R/S]	L6= ()
16	Note amount for line 6.**		[R/S]	L7= ()
17	Note amount for line 7.**		[R/S]	AID= ()
18	Displays adjusted itemized deductions.			
	This is not a line item.**		[R/S]	OTH PRF: ()
19	Key in total tax preference item ex-			
	cluding AID and CGO. This is note a	other tax		
	line item.*	preference items	[R/S]	L8= ()
20	Amount for line 8 - total preference.**		[R/S]	PSTI= ()
21	Note amount for line 9.**		[R/S]	10= ()
22	Note amount for line 10.**		[R/S]	11= ()
23	Note amount for line 11.**		[R/S]	NG or
				12= ()
24a	If "NG" appears in the display, line 11			
	was a negative amount. [R/S] to continue.		[R/S]	LO TX= ()
24b	Note display of tax on taxable income. If			

				SIZE: 055
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	this program was called by program "P2",			
	it will now return to "P2". If not,			
	will return to 11.		[R/S]#	CROTS: ()
				or MAX TAX
25	If "12= ()" appears in the display: Note			
	amount for line 12.**		[R/S]	12= ()
			[R/S]	13= ()
26	Note amount for line 13.**		[R/S]	14= ()
27	Note amount for line 14.**		[R/S]	15= ()
28	Note amount for line 15.**		[R/S]	16= ()
29	Note result for line 16.**		[R/S]	17= ()
30	Result for line 17.**		[R/S]	1.25%= ()
31	Line 18 - 25% of line 17.**		[R/S]	19= ()
32	Result needed for line 19.**		[R/S]	20= ()
33	Note amount for line 20.**		[R/S]	
34a	If subprogram "AMX" was loaded and a			
	value store on register 50, control will			
	now pass to "AMX". See User Instructions			
	for "AMX" at this time.			
34b	If subprogram "AMX" not run - note max-			
	imum tax calculated. (If "AMX" was run,			
	control returns to "MAX" at this point).		[R/S]#	LOW TX= ()
35	Displays the lower of: maximum tax or			
	tax rate schedule tax.		[R/S]#	CRDTS: ()
				or MAX TAX
36	If this program was called by program "P2",			
	it will now return. If not, will			

				SIZE : 055
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	go to step 11.			
	# If flag 21 is set and the printer attac	hed, this	[R/S] will not be	performed.
	If flag Ø3 is set, this prompt is ignor ** If flag Ø4 is set and flag 21 clear, th	ed. is display	will be omitted.	

Program Listings

01+LBL "MAX		49 XEQ 12	
		50 "10"	
02+LBL "AT"		51 XEQ "Y"	
03+LBL 00		52 -	
04 " MAX T	Heading	53 X<0?	
AX"		54 CLX	Toot for positive
05 FS?C 25		55 "11"	lest for positive
06 FC? 21		56 XEQ "Y"	ame on the II
07 PROMPT		57 X>0?	Test messed
08 50		58 GTO 06	lest passed
09 XEQ "P"	Initialize	59 "NG"	lest tailed
10 "PSNI"		60 FS? 21	
11 XEQ "X"		61 AVIEW	
12 RCL 06	Adjust gross	62 FC? 21	
13 "AGI"	income	63 PROMPT	
14 XEQ "Y"		64 RCL 03	
15 X <y?< th=""><th></th><th>65 GTO 10</th><th></th></y?<>		65 GTO 10	
16 ENTER↑		66+LBL 06	
17 /		67 2	
18 1 E2		68 /	
19 *		69 STO 07	
20 CF 02		70 "12"	
21 FS? 38	Test for FIX 2	71 XEQ "Y"	
22 SF 02		72 RCL 03	Regular tax with-
23 FIX 2		73.9875	out 1.25% credit
24 "PCT"		74 /	
25 XFQ "Y"		75 "13"	
26 1 F2		76 XEQ "Y"	
27 /		77 RCL Z	
28 FC2C 02		78 SF 02	
29 FIX 0	Restore FIX O	79 XEQ "R"	llse tax rate
30 RCI 02		80 "14"	schedules
31 "16"		81 XEQ "Y"	
32 XEQ "Y"		82 -	
33 *		83 X(02	
34 "17"		84 CLX	
35 XEQ "Y"		85 "15"	
36 RCI 44	Adjusted item-	86 XEQ "Y"	
37 "910"	ized deductions	87 XEQ 13	
38 XFQ "Y"		88 "16"	
39 "OTH PRF		89 XEQ "Y"	
		90 +	
40 XEQ "X"		91 "17"	
41 +		92 XEQ "Y"	
42 "18"		93 1.25	1.25% credit
43 XEQ "Y"		94 %	
44 -		95 1.25%	
45 STO 53		96 XFQ "Y"	
46 "PSTI"		97 -	
47 XEQ "Y"		98 "19"	
48 ENTERT		99 XEQ "Y"	

Program Listings

		· · · · · · · · · · · · · · · · · · ·
100 RCL 07		148 13961
101 +		149 GTO 02
102 STO 05		150+LBL 01
103 STO 54	Store maximum tax	151 CLX
104 "20"		152 13392
105 XEQ "Y"		153+LBL 05
106 PCI 50	Tost for amt on	154+LBL 02
107 X±02	line 29 sched D	155 END
108 XEO "OMX	Property alterna	
	tive max prog	
109 PCI 05		
110 PCL 54	Select lower of	
110 KCL 04	max and alterna-	
111 6/14	tive max taxes	
112 6\/1		
113 "MHX IX"		
114 XEQ "V"	Degular tax	
115 RCL 03	Regular Lax	
116 XXY?	Select lower of	
117 X<>Y		
118 STO 03	Curres	
119+LBL 10		
120 "LO TX"		
121 XEQ "V"		
122 FC?C 06		
123 GTO 00		
124 ADV		
125 GTO "F2"		
126+LBL "M2"	Calculated amt	
127+LBL 12	on line 10	
128 600		
129 GTO IND		
0 8		
130+LBL 04		
131 CLX		
132 447		
133 GTO 02		
134+LBL 01		
135 CLX		
136 415		
137+LBL 05		
138+LBL 02		
139 1 E2		
140 *		
141 RTN		
142+LBL "M3"	Calculate_amt	
143+LBL 13	on line 16	
144 19678		
145 GTO IND		
08		
146+LBL 04		
147 CLX		

⁸⁴ REGISTERS, STATUS, FLAGS, ASSIGNMENTS

	DATA RE	GIS	TERS				STA	TUS		
00		50 53	Personal service	SIZE	05	5 TOT FIX	. REG SCI	I	USER MO	DE 0FF
03	Fed tax payable	<u>со</u>	taxable income	DEG		RAD	GR	AU		
05	Scratch	55	Maximum tax		ΙΝΙΤ		FL/	AGS		
				#	S/C	SET I	NDICATE	S	CLEAR INDI	CATES
07	Index register			2		Subrout	<u>tine for</u>	^		
08	Status information					progra	<u>am "IR"</u>			
10		60		0		Secona	<u>level</u> s	sub-		
		00		21		Printer	n enable	2		
				25		Error	ignore			
				38		Number	of digi	its		
15		65								
20		70								
25		75								
30		80								
		0.5								
35		85								
										KEY
40		90		'	UNC		NET	¹		RET
<u> </u>										
45		95								
<u> </u>										
L	L			L			L	L		

COMPUTATION OF ALTERNATIVE MAXIMUM TAX (FORM 4726)

Program "AMX"

"AMX" is a subroutine of program "MAX" and is called automatically by that program if there is a value stored in register 50. The programs "MAX", "TR", and "TX" must be loaded to execute "AMX". There are no optional subprograms.

Sequence of displays during execution:

There is no locator prompt for this program.

21=	Line 21.	
22=	Line 22.	
24=	Line 24. Note:	The program does not display an amount for Line 23. Line 23 is the same as Line 10.
25=	Line 25.	
26=	Line 26.	
27=	Line 27.	
28=	Line 28.	
29=	Line 29.	
30=	Line 30.	
31=	Line 31.	
32=	Line 32.	
33=	Line 33.	

AMX TX= Alternative maximum tax.

Setting flag 04 does not suppress this output.

EXAMPLE:

Calculate the maximum tax based on the form on the next page.

Programs "TX", "TR", "MAX" and "AMX" must be loaded and the SIZE set to a minimum of 055. Clear flags 03 and 04 to allow all displays to be seen. Since "MAX" is not going to be called from "P2", flag 06 should be cleared. The status of flag 21 should be set to match the state of the printer: printer on - set flag 21, no printer or printer off - clear flag 21. This example assumes that all prompted for values are initially zero, that the display format is FIX 0, and that flags 28 and 29 are set.

135615 [ST0] 06 2248 [ST0] 44 13500 [ST0] 47 Adjusted Gross Income Adjusted Itemized Deductions Capital Gain Deduction 22500 [ST0] 50 TXABLE: 116,809. [R/S] TXABLE: 116,809. [R/S] STATUS: 0. 2 [R/S] TAX=51,632. [KQ] "MAX" Calculate tax [KS] STATUS: 0. 2 [R/S] TAX=51,632. [KQ] "MAX" Calculate Maximum tax [AA]usted Gross Income AGI=135,615. [R/S] PSNI: 0. 127960 [R/S] AGI=135,615. [R/S] L6=116,809. [R/S] L6=116,809. [R/S] L6=116,809. [R/S] L6=116,809. [R/S] L0=2,248. [R/S] D1=2,248. [R/S] I1=41,373. [R/S] 11=41,373. [R/S] 12=20,687. [R/S] 13=52,286. [R/S] 13=52,286. [R/S] 12=29,196. [R/S] 12=29,197. [R/S] 12=20,687. [R/S] 12=22,687. [R/S] 12=23,182. [R/S]	DISPLAY	KEYSTROKES	COMMENTS
STATUS: 0. 2 [R/S] TAX=51,632. [XEQ] "MAX" Calculate Maximum tax MAX TAX [R/S] PSNI: 0. 127960 [R/S] AGI=135,615. [R/S] L6=116,809. [R/S] L7=110,221. [R/S] JTH PR: 0. 6,600. [R/S] AID=2,248. [R/S] OTH PR: 0. 6,600. [R/S] L8=8,848. [R/S] D10=60,000. [R/S] 11=41,373. [R/S] 12=20,687. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 17=29,156. [R/S] 17=29,156. [R/S] 12=20,687. [R/S] 12=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,667. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] <td>TXABLE: 116,809.</td> <td>135615 [STO] 06 2248 [STO] 44 13500 [STO] 47 22500 [STO] 50 116809 [XEQ] "TR" [R/S]</td> <td>Adjusted Gross Income Adjusted Itemized Deductions Capital Gain Deduction Line 29, Schedule D Taxable income Calculate tax</td>	TXABLE: 116,809.	135615 [STO] 06 2248 [STO] 44 13500 [STO] 47 22500 [STO] 50 116809 [XEQ] "TR" [R/S]	Adjusted Gross Income Adjusted Itemized Deductions Capital Gain Deduction Line 29, Schedule D Taxable income Calculate tax
OTH PŔF: 0. 6,600. [R/S] L8=8,848. [R/S] PSTI=101,373. [R/S] 10=60,000. [R/S] 11=41,373. [R/S] 12=20,687. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 25=23,475. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 31=23,182. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	TAX=51,632. MAX TAX PSNI: 0. AGI=135,615. PCT=94.36 L6=116,809. L7=110,221. AID=2,248.	[XEQ] "MAX" [R/S] 127960 [R/S] [R/S] [R/S] [R/S] [R/S] [R/S] [R/S]	Calculate Maximum tax
Exposition [R/S] Non-on-on-on-on-on-on-on-on-on-on-on-on-o	OTH PRF: 0.	6,600. [R/S]	
10=60,000. [R/S] 11=41,373. [R/S] 12=20,687. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=101,373. [R/S] 22=441,373. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 29=23,475. [R/S] 31=23,182. [R/S] 31=23,182. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	PSTI=101,373.		
11=41,373. [R/S] 12=20,687. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 22=20,687. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	10=60,000.	[R/S]	
12=20,687. [R/S] 13=52,286. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 1.25%=364. [R/S] 20=49,479. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 25=46,605. [R/S] 27=42,808. [R/S] 26=46,605. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 1.25%=293. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 31=23,182. [R/S] 33=48,369. [R/S] 33=48,369. [R/S] MAX TX=48,369.	11=41,373.	[R/S]	
13=52,286. [R/S] 14=42,808. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 25=20,687. [R/S] 25=23,475. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	12=20,687.	[R/S]	
14=42,808. [R/S] 15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	13=52,286.	[R/S]	
15=9,478. [R/S] 16=19,678. [R/S] 17=29,156. [R/S] 1.25%=364. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 31=23,182. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	14=42,808.	[R/S]	
16=19,678. [R/S] 17=29,156. [R/S] 1.25%=364. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 25=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	15=9,478.	[R/S]	
17=29,156. [R/S] 1.25%=364. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 22=20,687. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	16=19,678.	[R/S]	
1.25%=364. [R/S] 19=28,792. [R/S] 20=49,479. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	17=29,156.		
19=28, /92. [R/S] 20=49, 479. [R/S] 21=107, 809. [R/S] 22=101, 373. [R/S] 24=41, 373. [R/S] 25=20, 687. [R/S] 26=46, 605. [R/S] 27=42, 808. [R/S] 28=3, 797. [R/S] 29=23, 475. [R/S] 1.25%=293. [R/S] 31=23, 182. [R/S] 32=4, 500. [R/S] 33=48, 369. [R/S] MAX TX=48, 369. [R/S] Maximum Tax The lower of the two computed	1.25%=364.		
20=49,4/9. [R/S] 21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	19=28,792.		
21=107,809. [R/S] 22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	20=49,4/9.		
22=101,373. [R/S] 24=41,373. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	21=107,809.		
24=41,373. [R/S] 25=20,687. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] The lower of the two computed	22=101, 3/3.		
25-20,007. [R/S] 26=46,605. [R/S] 27=42,808. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	24=41,3/3.		
20-40,005. [R/S] 27=42,808. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] The lower of the two computed	25-20,007.		
27-42,808. [R/S] 28=3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	20-40,000.		
20-3,797. [R/S] 29=23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax [D TX=48,369.	27-42,000. 29-2 707		
29-23,475. [R/S] 1.25%=293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] The lower of the two computed	20-3,/9/.		
1.25%-293. [R/S] 31=23,182. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] IO TX=48.369. [R/S]	29-23,4/3. 1 25%-202		
31-23,162. [R/S] 32=4,500. [R/S] 33=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S] Maximum Tax The lower of the two computed	1.20/-293.		
32=48,369. [R/S] MAX TX=48,369. [R/S] MAX TX=48,369. [R/S]	32=4 500		
MAX TX=48,369. [R/S] Maximum Tax 10 TX=48,369 The lower of the two computed	33=18 360		
$\frac{10}{10} \text{ TX} = 48.369$	JJ-40,JUJ. MAY TY-10 260		Maximum Tax
	10 TX = 48 369	[() 3]	The lower of the two computed

taxes. ipu

				SIZE: 055
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
	This program is executed only as a sub-			
	program of "MAX". It is therefore assumed			
	that "AMX" has been called by "MAX".			
				21= ()
1	Note value for line 21.**		[R/S]	22= ()
2	Note value for line 22.**		[R/S]	24= ()
3	Note value for line 24.**		[R/S]	25= ()
4	Note value for line 25.**		[R/S]	26= ()
5	Note value for line 26.**		[R/S]	27= ()
6	Note value for line 27.**		[R/S]	28= ()
7	Note value for line 28.**		[R/S]	29= ()
8	Note value for line 29.**		[R/S]	1.25%= ()
9	Note value for line 30.**		[R/S]	31= ()
10	Note value for line 31.**		[R/S]	32= ()
11	Note value for line 32.**		[R/S]	33= ()
12	Note value for line 33.**		[R/S]	ΜΑΧ ΤΧ
	Control returns to "MAX" at this point.			
	** If flag Ø4 is set, and flag 21 is clear,	this displ	ay will be omitt	ed.

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Program Listings

01+LBL "AMX	Calculate alter-	51 5
••	native maximum	52 /
02 XEQ 09	tax	53 "32"
03 STO 01		54 XEQ "Y"
04 "21"		55 +
05 XEQ "Y"		56 RCL 07
06 RCL 53		57 +
97 X>Y2		58 STO 05
08 XCY		59 "33"
00 AV21		60 XEO "Y"
10 450 444		
10 AEQ 11 VEO #MO#	Amount from	$\begin{array}{c} 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 \\ 0 $
	line 10	62 KUL 00 67 DTV
12 -	The It	63 KIN
13 "24"		64+LBL 09
14 XEQ "Y"		65 RCL 50
15 X<0?		66.4
16 GTO 10		67 *
17 2		68 RCL 02
18 /		69 X<>Y
19 "25"		70 -
20 STO 07		71 END
21 XEQ "Y"		
22 RCL 01		
23 SE 02		
24 XFQ "R"	llse tax rate	
25 "26"	schedules	
23 20 24 YEO "Y"		
20 100 1		
21 AEW 07		
20 KUL JJ 20 V/V2		
30 84 21		
31 RUN		
32 SF 02		
33 XEQ "R"	Use tax rate	
34 "27"	schedules	
35 XEQ "Y"		
36 -		
37 "28"		
38 XEQ "Y"		
39 XEQ "M3"	Amount from	
40 +	line 16	
41 "29"		
42 XEQ "Y"		
43 1.25	1.25% credit	
44 %		
45 "1.25%"		
46 XFQ "Y"		
47 -		
48 "71"		
49 XF0 "V"		
50 DCL 50		
JU KUL JU		

REGISTERS, STATUS, FLAGS, ASSIGNMENTS [®]

	DATA RE	GIS	TERS				STA	TUS		
00 01	Scratch	50		SIZE ENG DEG		TOT FIX - RAD	. REG SC GR	I AD	USER MOI ON C	DE IFF
05	Scratch	55		#	INIT S/C	SET		AGS s	CLEAR INDI	CATES
07	Index register			2		Subrout tor fo "TR"	ine ind or progr	ica- am		
10		60								
15		65								
20		70								
25		75								
30		80								
35		85								
							ASSIGN	IMEN	TS	
40		90			UNCI		KEY	F	UNCTION	
45		95								

COMPUTATION OF MINIMUM TAX (FORM 4625)

Program "MIN"

Program "TX" must be loaded before execution of "MIN". There are no optional subprograms. Program "MIN" may be executed as a subprogram of "P2" or may be executed independently. If executed independently, the following data is needed:

in R08: Status code in R27: Amount from Line 47, Form 1040 (FT47). Net tax after credits. (This amount may already be present from an earlier run of program "P2").

If program "MIN" is present, it is automatically executed when program "P2" is run.

Sequence of displays during execution:

MIN TAX	Locator prompt identifying the program.
OTH PRF:	Tax Preference items other than Adjusted Itemized Deductions (AID) and Capital Gain Deduction (CGD)
FT47:	Amount from Form 1040, Line 47. (Net tax after credits).
L7=	Line 7.
L8=	Line 8.
L9=	Line 9.
MIN TX=	Minimum Tax. The amount of minimum tax is stored in register 23 for use with programs "P2" and "AMN".

Setting of flag 04 does not suppress this output.

NOTE: This program assumes that amounts on Lines 4, 5, 12, 14, and 17 of the form are zero. See Form 4625.

EXAMPLE:

#

Calculate the minimum tax based on net tax after credits of \$123, filing status of 2 and tax preference items of \$20,000.

Programs "TX" and "MIN" must be loaded and SIZE must be set to at least 053. Clear flags 03 and 04 (to allow all displays) and set the status of flag 21 to correspond to the state of the printer. This example assumes that the display mode is FIX 0 and that the flags 28 and 29 are set.

DISPLAY	KEYSTROKES	COMMENTS
MIN TAX OTH PRF: 0. FT47=123. L7=10,000. L8=10,000. MIN TX=1,500.	2 [STO] 08 123 [STO] 27 [XEQ] "MIN" [R/S] 20000 [R/S] [R/S] [R/S] [R/S]	Store filing status. Store net tax after credits. Calculate minimum tax. Locator prompt. Enter other tax preferences. Net tax credits. Line 7. Line 8. Minimum tax.

				SIZE: 053
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "MIN" and pack it.		[GTO]	
3	Set SIZE and desired display mode.			
4	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may have been set at			
	calculator power-on. If the printer is			
	to be used, it should be set to manual			
	mode).			
5	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
6	To suppress output displays		[SF] Ø4	
	To allow output displays		[CF] Ø4	
7	If "MIN" is not called as a subprogram			
	of "FT " .		[CF] Ø6	
8	Begin execution.		[XEQ] "MIN"	MIN TAX
9	Note locator prompt and continue.		[R/S]#	OTH PRF: ()
10	Key in amount of total tax preference if			
	different from displayed value. *	oth prf	[R/S]	
11	If this program was called from program "P2'			
	it will return to "P2". If executed as			
	stand alone, go to step 7.			
	# If flag 21 is set and the printer attack	ed, this [R/S] will not be	performed.
	* If flag Ø3 is set, this prompt is ignore	d.		

Program Listings

01+LBL "MIN 02+LBL 00 03 " MIN T Heading AX... 04 FS?C 25 05 FC? 21 **06 PROMPT** 07 51 Initialize 08 XEQ "P" 09 "OTH PRF ... 10 XEQ "X" Form 1040 11 RCL 27 line 47 12 "FT47" 13 XEQ "Y" 14 2 15 / 16 5 E3 17 GTO IND 08 18+LBL 05 19+LBL 04 20+LBL 01 21+LBL 02 22 ST+ X 23+LBL 03 24+LBL 02 25 X>Y? 26 X<>Y 27 RDN 28 "L7" 29 XEQ "Y" 30 -31 X<0? 32 CLX 33 "L8" 34 XEQ "Y" 35 15 36 % Store minimum tax 37 STO 23 38 "MIN TX" 39 XEQ "V" 40 FC?C 06 Restart 41 GTO 00 42 ADV 43 GTO "F3" Return to 1040 page 2 program 44 .END.

⁹⁴ REGISTERS, STATUS, FLAGS, ASSIGNMENTS

00 50 SIZE 053 TOT. REG. USER MODE 05 55 DEG FIX SCI ON OFF 05 55 FLAGS FLAGS INIT SET INDICATES CLEAR INDICATES 08 Status information 6 Second level sub- program 10 60 25 Error ignore Image: Second level sub- Image: Second level sub- 115 65 1 1 Image: Second level sub- Image: Second level sub- 12 Printer enable 1 1 Image: Second level sub- Image: Second level sub- 10 60 25 Error ignore Image: Second level sub- Image: Second level sub- 10 60 25 Error ignore Image: Second level sub- Image: Second level sub- 13 65 Image: Second level sub- Image: Second level sub- Image: Second level sub- Image: Second level sub- 12 1 1 1 Image: Second level sub- Image: Second level sub- Image: Second lev	DATA REGISTERS STATUS										
Image: status information FLAGS 08 Status information 6 21 Printer enable 10 60 25 Error ignore 10 65 15 65 15 65 10 70	00		50		SIZE ENG DEG		3 TOT FIX - RAD	. REG SCI GR	AD	USER MOI 	DE FF
# S/C SET INDICATES CLEAN INDICATES 08 Status information 6 Second level sub- program 10 60 21 Printer enable 10 60 25 Error ignore 11 65 1 1 12 1 1 1 13 65 1 1 14 1 1 1 15 70 1 1	05		55		,,		0.57	FLA	AGS		04750
08 Status information 21 Printer enable 10 60 25 Error ignore 10 60 25 Error ignore 11 60 1 1 12 1 1 1 13 65 1 1 14 1 1 1 15 65 1 1 16 1 1 1 15 70 1 1					#	5/0	SET I	lovel	5 	CLEAR INDI	CATES
Observed Program 10 60 25 Error ignore 10 60 10 60 10 60 10 60 10 60 10 60 10 60 10 1 11 1 11 1 12 1 13 1 14 1 15 1 15 1 15 1 15 1 15 1 15 1 15 1 16 1 17 1 18 1 19 1 19 1 10 1 10 1 11 1 12 1 13 1 14 1 15 1 16 1 17 1 18 1 19 1 19 1 10 1 10 1 10 1 11 1 <td>08</td> <td>Status information</td> <td></td> <td></td> <td>0</td> <td></td> <td>progra</td> <td>m</td> <td><u>ub-</u></td> <td></td> <td></td>	08	Status information			0		progra	m	<u>ub-</u>		
10 60 25 Error ignore 10 60 25 Error ignore 10 1 1 1 11 1 1 1 15 65 1 1 10 1 1 1 11 1 1 1 12 1 1 1 15 1 1 1 15 1 1 1 15 1 1 1 15 1 1 1 15 1 1 1 15 1 1 1 16 1 1 1 17 1 1 1	00	Status III of matter			21		Printer	 enable			
15 65 1 1 10 1 1 1 10 1 1 1 10 1 1 1 10 1 1 1 10 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 115 1 1 1 116 1 1 1 117 1 1 1 118 1 1 1	10		60		25		Error i	anore			
Image: Second								3.101.0			
Image: state of the state											
15 65 1 1 15 65 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 20 70 1 1 1 1 1 1 1 1											
15 65 20 70 20 70											
	15		65								
20 70 1 1 1											
20 70 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6 6	L										
20 70											
	20		70								
	20		70								
			-								
23 Minimum tax	23	Minimum tax									
25 75	25		75								
	L										
										; 	
20 80	20		00								
	30		00								
35 85	35		85								
ASSIGNMENTS								ASSIGN	MEN	ITS	
FUNCTION KEY FUNCTION KEY						FUNC	TION	KEY	F	UNCTION	KEY
40 90	40		90								
	L										
	15		05								
	45		95					 			
	 							 			
								+			
	 							 			

COMPUTATION OF ALTERNATIVE MINIMUM TAX (FORM 6251)

Program "AMN"

Program "TX" must be loaded before execution of "AMN". Program "AMN" may be executed as a subprogram of program "P2" or may be executed independently. If executed independently, the following data is needed:

in RO6:	Adjusted Gross Income
in R08:	Status code
in R09:	Number of exemptions
in R21:	Amount of net deductions
in R23:	Minimum tax (See program "MIN")
in R27:	Amount on Line 47, Form 1040 (FT47)
in R44:	Adjusted Itemized Deductions (AID)
in R47:	Capital Gain Deduction (CGD)
in R49:	Long-term capital gains after 6/9/81
	(81LTG). See program "DT".
in R50:	Amount on Line 29, schedule D.

Program "TX" must be loaded before execution of "AMN". If program "AMN" is present, it is automatically executed when program "P2" is run.

Sequence of displays during execution:

ALT MIN TX	Locator prompt identifying the program.
AGI=	Adjusted Gross Income
DEDS=	Net Deductions after subtracting the zero amount.
ZBA=	Zero Bracket Amount
EXMPS=	Number of exemptions x \$1,000.
2d=	Line 2d.
L3=	Line 3.
AID=	Adjusted Itemized Deductions.
CGD=	Capital Gains Deduction.
4c=	Line 4c. Total preferences used for this form.
AMTI=	Alternative Minimum Taxable Income.
IV.D=	Tax from Part IV, Line D on AMTI.
22=	Line 22.
23=	Line 23.

	24=	Line 24.
	25=	Line 25.
	26=	Line 26.
	27=	Line 27.
	L6=	Line 6. Lower of Line 27 or IV.D.
	FT47=	Amount from Line 47, Form 1040. Line 7.
	MIN TAX=	Minimum Tax from Form 4625. Line 8.
	L10=	Line 10.
#	AMN TX=	Alternative Minimum Tax. The amount of alternative minimum tax is stored in register 24 for use with program "P2".

This display is not suppressed by the setting of flag 04.

NOTE: The program assumes that amounts on Lines 12 and 14 of the form are zero. See Form 6251.

EXAMPLE:

Calculate the alternative minimum tax based on the form on the next page.

Programs "TX" and "AMN" must be loaded and SIZE must be set to 053 at a minimum. Set the status of flag 21 to match the state of the printer: printer attached and on - set flag 21, printer not attached or off - clear flag 21. Clear flags 03 and 04 to enable all displays. Since "AMN" will not be called from "P2", clear flag 06. This example assumes that the display mode is FIX 0 and that flags 28 and 29 are set.

DISPLAY

ALT MIN TAX AGI=80,000. DEDS=68,700. ZBA=3,400. KEYSTROKES

COMMENTS

80000 [ST0] 06 2 [ST0] 08 7 [ST0] 09 68700 [ST0] 21 1500 [ST0] 23 123 [ST0] 27 16100 [ST0] 44 90000 [ST0] 47 42300 [ST0] 49 13000 [ST0] 50 [XEQ] "AMN" [R/S] [R/S] [R/S]	Adjusted Gross Income Status Code Number of exemptions Amount of net deductions Minimum Tax Line 47, Form 1040 Adjusted Itemized Deductions Capital Gains Deductions Long Term Gains Line 29, Schedule D
[R/S]	

EXEMPS=7,000 2d=79,100	[R/S] [R/S]
L3=900.	ĪR/SĪ
AID=16,100.	[R/S]
CGD=90,000.	ĪR/SĪ
4c=106,100.	[̈́R/S]
AMTI=107,000.	[R/S]
IV.D=13,750.	[R/S]
22=107,000.	[R/S]
23=13,000.	ĪR/S]
24=94,000.	[R/S]
25=10,800.	[R/S]
26=2,600.	[R/S]
27=13,400.	[R/S]
L6=13,400.	[R/S]
FT47=123.	[R/S]
MIN TX=1,500.	[R/S]
L10=1,623.	[R/S]
AMN TX=11,777.	_ · _

Alternate Minimum Tax

				SIZE: 053
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
1	Load program "TX" and pack it.		[GTO]	
2	Load program "AMN" and pack it.		[GTO]	
3	Set appropriate SIZE and desired display			
	mode.			
4	Set the status of flag 21 to match the			
	printer's condition: printer on -		[SF] 21	
	printer off -		[CF] 21	
	(The proper status may be set at calculator			
	power-on. If the printer is to be used,			
	it should be set to manual mode).			
5	To suppress the input prompts -		[SF] Ø3	
	To allow input prompts -		[CF] Ø3	
6	To suppress output displays -		[SF] Ø4	
	To allow output displays -		[CF] Ø4	
7	If "AMN is not to be called as a subprogram			
	of "P2"		[CF] Ø6	
8	Begin execution.		[XEQ] "AMN"	ALT MIN TAX
	Note locator prompt and continue.		[R/S]#	AGI= ()
9	Note amount of adjusted gross income.**	AGI	[R/S]	DEDS= ()
10	Note amount of net deductions after sub-			
	tracting the Zero Bracket Amount.**	DEDS	[R/S]	ZBA= ()
11	Note amount of Zero Bracket Amount.**	ZBA	[R/S]	EXEMPS= ()
12	Note number of exemptions X \$1,000.**	exmps	[R/S]	2d= ()
13	Note amount of line 2d.**	line 2d	[R/S]	L3= ()
14	Note amount from line 3.**	line 3	[R/S]	AID= ()
15	Note amount of adjusted itemized			
	deductions.**	AID	[R/S]	CGD= ()

				SIZE: 053
STEP	INSTRUCTIONS	INPUT	FUNCTION	DISPLAY
16	Note amount of capital gain deductions.**	CGD	[R/S]	4c= ()
17	Note amount from line 4.**	line 4c	[R/S]	AMTI= ()
18	Note amount of alternative minimum tax-			
	able income	AMTI	[R/S]	IV.D= ()
19	Note amount of tax from part IV, line D			
	on AMIT.**	IV.D	[R/S]	L6= ()
20	Note amount from line 6.**	line 6	[R/S]	FT47= ()
21	Note amount from line 47, form 1040.**	FT47	[R/S]	MIN TX= ()
22	Note amount of minimum tax from form 4625.**	MIN TX	[R/S]	L 10= ()
23	Note amount from line 10.**	line 10	[R/S]	AMN TX= ()
24	Note amount of alternative minimum tax.**	AMN TX	[R/S]	
25	If "AMN" was called from program "P2" it			
	will return to "P2". If executed as			
	stand along, go to step 7.			
	* If flag Ø3 is set, this prompt is ignore	d.		
	** If flag Ø4 is set and flag 21 clear, thi	s display	will be omitted.	

Program Listings

01+LBL "AMN "	•	50 1 E5 51 GTO IND	\$50,000
		00	
02VLBL 00			
03 "HLI MIN		52€LBL 03	\$25,000 11
TAX"		53 2	married,_filing
04 FS?C 25		54 /	separately
05 FC? 21		55+LBL 05	
06 PROMPT		56+LBL 04	
07 YEO "P"		57+LBL 01	
	Adjusted aposs		
08 KLL 06	incomo	JOVEDE 02	
09 "HGI"	Income	59 X()1	
10 XEQ "Y"		60 X<=Y?	
11 RCL 21	Net deductions	61 GTO 06	
12 "DEDS"		62 "22"	
13 XEQ "Y"		63 XEQ "Y"	
14 XEQ "78"	Compute Zero	64 RCI 50	
15 "700"	Brackot amt	25 - 27-	
15 204			
16 XEQ "Y"		66 XEQ "1"	
17 +		67 -	
18 RCL 09	Number of exempts	68 "24"	
19 1 E3	X \$1,000	69 XEQ "Y"	
20 *		70 XEQ 07	
21 "EXMPS"		71 "25"	
22 XEO "Y"		72 XEQ "Y"	
		77 PCI 50	
		73 KUL 30	
24 "20"		74 5	
25 XEQ "Y"		75 /	
26 -		76 "26"	
27 "L3"		77 XEQ "Y"	
28 XEQ "Y"		78 +	
29 RCI 44	Adjusted item-	79 "27"	
30 "OID"	ized deductions	80 XEO "Y"	
71 VEO "V"			
32 RUL 47	Capital gain	82 8777	
33 "CGD"	deduction	83 X<>Y	
34 XEQ "Y"		84 STO 01	
35 +		85+LBL 06	
36 "4c"		86 RCL 01	
37 XEQ "Y"		87 "L6"	
38 +		88 XEQ "Y"	
39 STO 01		89 RCL 27	Form 1040
40 "OMTI"		90 "ET47"	line 47
		01 VEO "V"	
41 ACM 1	Compute Dawt IV	71 AEV 1	
42 XEU 07	tompute Part IV	92 KUL 23	
43 "IV.D"	Lax	93 "MIN TX"	
44 XEQ "Y"		94 XEQ "Y"	
45 X<> 01		95 +	
46 RCL 49		96 "L10"	
47 X=0?		97 XEQ "Y"	
48 GTO 06		98 -	
19 PTN		99 V/02	
		22 AND:	

Program Listings

100 CLX		150	ST+ 00	
101 STO 24	Store alternative	151	RDN	
102 "AMN TX"	minimum tax	152	.END.	
103 XEQ "V"				
104 FC?C 06				
105 GTO 00	Restart			
106 ADV				
107 GTO "F4"	Return_to 1040			
108+LBL 07	page 2 program			
109 0	Computation of			
110 STO 00	Part IV tax			
111 RDN				
112 1 E4				
113 2				
114 CF 02				
115 GTO IND				
08				
116+LBL 03				
117 ST Y				
118 SF 02				
119+LBL 00				
120+LBL 04				
121+LBL 01				
122VLBL 02				
123 RUN 194 7				
124 /				
125 2				
120 10 127 VEN 00				
127 AE& 00				
129 10				
170 XEQ 08				
171 4				
132 5				
133 XEQ 08				
134 RCI 00				
135 1 E2				
136 2				
137 FS?C 02				
138 ST/ Y				
139 RDN				
140 *				
141 RTN				
142 + LBL 08				
143 RDN				
144 -				
145 X<0?				
146 0				
147 RCL X				
148 R↑				
149 *				

¹⁰² REGISTERS, STATUS, FLAGS, ASSIGNMENTS

DATA REGISTERS			STATUS								
00 01	Scratch Scratch	50		SIZE <u>053</u> TOT. REG ENG FIX SCI DEG RAD GRAD				USER MODE ON OFF			
05		55			INIT		FL	AGS			
				#	S/C	SET	NDICATE	<u>S</u>	CLEAR INDI	CATES	
00	Ctatus information			2		Subrout	n progr	1Cd-			
00	Status Information					"TR"	r progr				
10		60		6		Second	level s	ub-			
<u> </u>						progra	m				
				21		Printer	enable				
				25		Error i	gnore				
15		65									
							17 Mart - 16 Color Port and an India and an				
		70									
20		70									
24	Alternative										
	minimum tax										
25		75									
30		80									
							t				
35		85									
						1	ASSIGN	IMEN	TS		
					FUNC	TION	KEY	F	UNCTION	KEY	
40		90						·			
45		95									
						19					

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HP-41**C**

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1981 TAXES

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P2

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SG



SD







MAX













NOTES

NOTES



Rev. A

Hewlett-Packard Software

In terms of power and flexibility, the problem-solving potential of the HP-41C programmable calculator is nearly limitless. And in order to see the practical side of this potential, HP has different types of software to help save you time and programming effort. Every one of our software solutions has been carefully selected to effectively increase your problem-solving potential. Chances are, we already have the solutions you're looking for.

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* Some books require additional memory modules to accomodate all programs.

1981 TAXES

The programs in this book are designed to be run individually or as an interactive chain in which the data is automatically carried from program to program. The programs will be easier and faster to use when the programs are used interactively. The best way to do this is to use an HP-41CV or HP-41C with a Quad Memory Module (HP 82170A).

INDIVIDUAL INCOME TAX CONTROL PROGRAM FOR THE INCOME TAX PROGRAM PACKAGE FEDERAL TAX RATE SCHEDULES FEDERAL TAX (Form 1040, Page 1) FEDERAL TAX (Form 1040, Page 2) TAX TABLE ADJUSTMENT SUBROUTINE SCHEDULE A (Itemized Deductions) SCHEDULE G (Income Averaging) SCHEDULE D (Capital Gains and Losses) SCHEDULE D, PART V (Calculation of Capital Loss Carry Over) ALTERNATIVE TAX COMPUTATION FROM SCHEDULE D COMPUTATION OF MAXIMUM TAX (Form 4726) COMPUTATION OF ALTERNATIVE MAXIMUM TAX (Form 4726) COMPUTATION OF ALTERNATIVE MINIMUM TAX (Form 6251)

