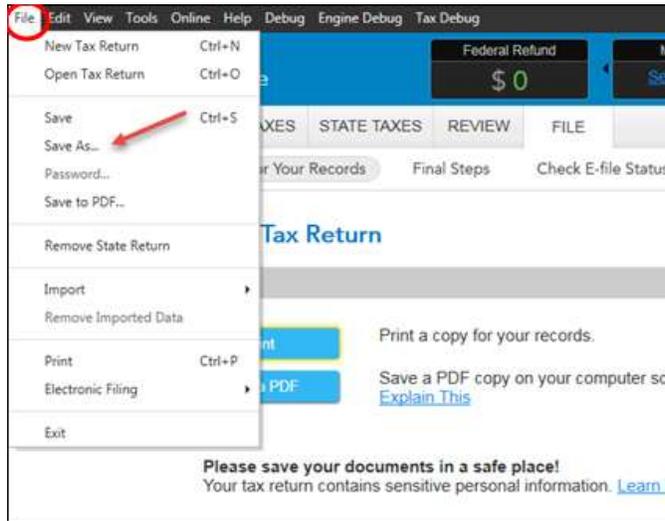
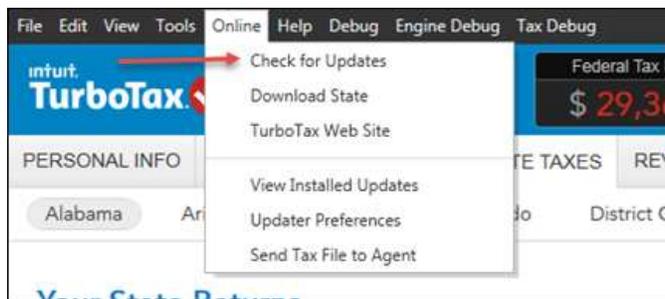


2016 Illinois Non-Qualified Plan Retirement Adjustment Amend Instructions for TurboTax CD/Download:

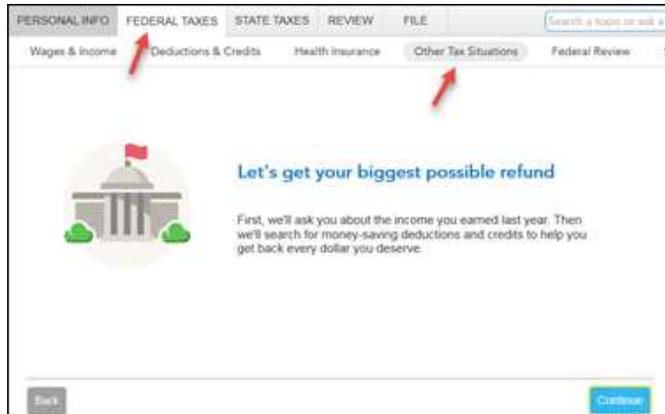
- 1) Select and open your return.
- 2) Select **File** and **Save As** "Amended 2016 return" before you update TurboTax to preserve your original return.



- 3) Select **Online** and **Check for Updates**.



- 4) Go to **Federal Taxes** tab (if using the Home and Business Product, go to the **Personal** tab) and then select the **Other Tax Situations** tab

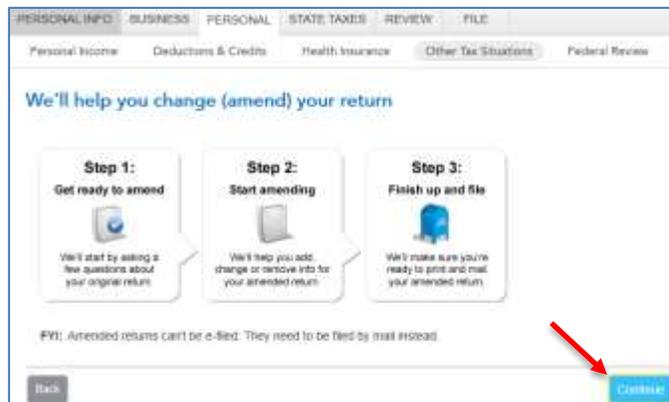


- 5) On the **Other Tax Situations** screen, scroll down to **Other Tax Forms** and next to **Amend a Return**, select the **Start** button.



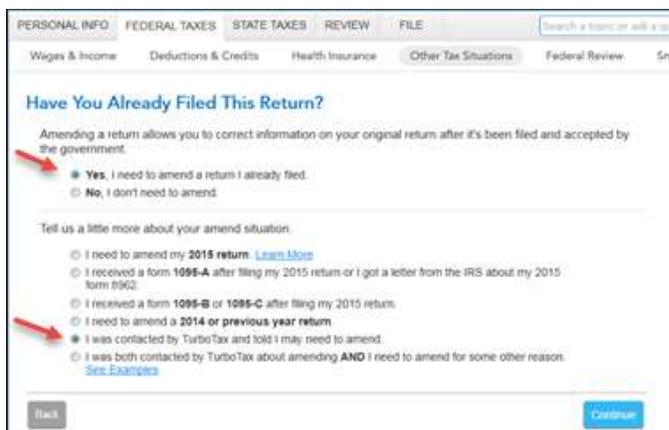
Start to Amend Your Return:

- 1) On the **We'll Help you change (amend) your return** screen, click **Continue**.



2) On the **Have You Already Filed This Return?** screen, select **Yes, I need to amend a return I already filed.**

Also select **I was contacted by TurboTax and told I may need to amend**, then click **Continue.**



3) On the **Tell Us Which Returns You Want to Amend** screen, select **I want to amend only my federal or only my state return.** Select **Amend my Illinois return.** Then select **Continue.**

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE

Personal Income Deductions & Credits Health Insurance **Other Tax Situations** Federal Review

Tell Us Which Returns You Want to Amend

We recommend you amend both your **federal and state** returns. That's because both the IRS and your state will want to know why you amended your return.

I want to amend **both** my federal and state returns.
 I want to amend **only** my federal or only my state return.

What is a CR to amend only one return?

Are you sure you want to amend **only one** return?

We strongly recommend amending both your federal and state returns.

If you're sure about amending only one return, select the return you want to amend.

Amend my federal return
 Amend my Illinois return

Back Continue

- 4) On the **Do you still receive your mail at this address**, make a selection then click **Continue**.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE

Personal Income Deductions & Credits Health Insurance **Other Tax Situations** Federal Review

Do you still receive your mail at this address?

555 X XX Xx 555
 Jxxxxx, IL
 60002

Yes
 No

Back Continue

- 5) If you see the **Presidential Election Campaign Fund** screen, make a selection then click **Continue**.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE

Personal Income Deductions & Credits Health Insurance **Other Tax Situations** Federal Review

Presidential Election Campaign Fund

You can now make a \$3 contribution to the Presidential Election Fund on your amended return if you did not make an election when you filed originally.

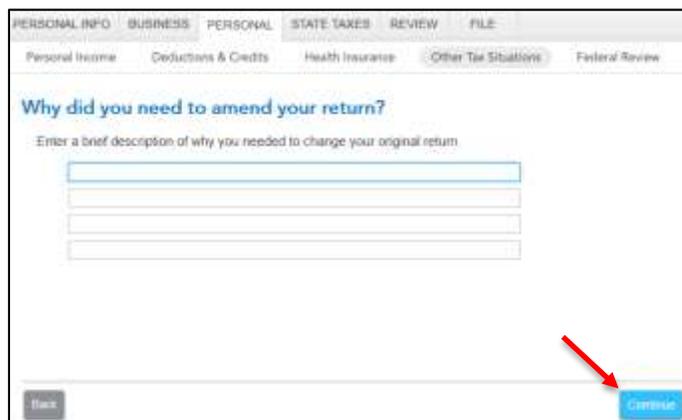
Making a contribution does not impact your refund or any tax due.

Do you want to make a contribution?

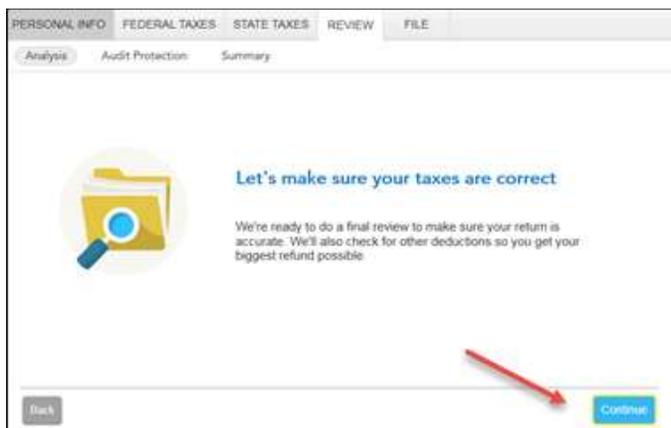
Yes, I want to contribute
 No, I don't

Back Continue

- 6) On the **Why did you need to amend your return?** screen, indicate **“The Illinois return included a subtraction for a distribution from a non-qualified employee benefit plan on Line 8 of Form IL-1040. The adjustment to the Illinois return removes the subtracted amount and reflects the correct amount of income for the state return.”** Then select **Continue**.

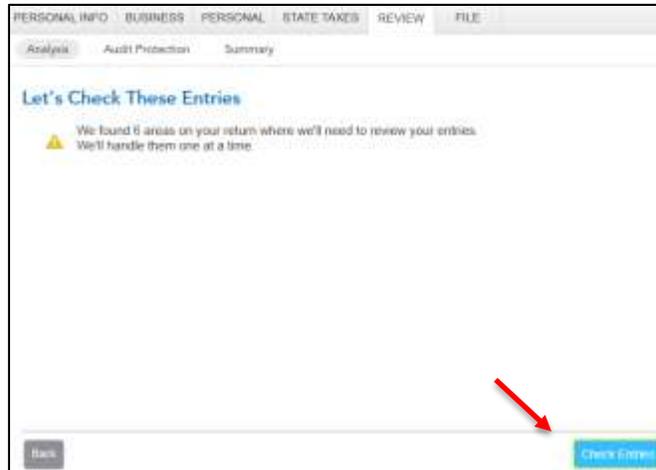


- 7) On the **Let's make sure your taxes are correct** screen, select **Continue** and complete all final review questions, if any.

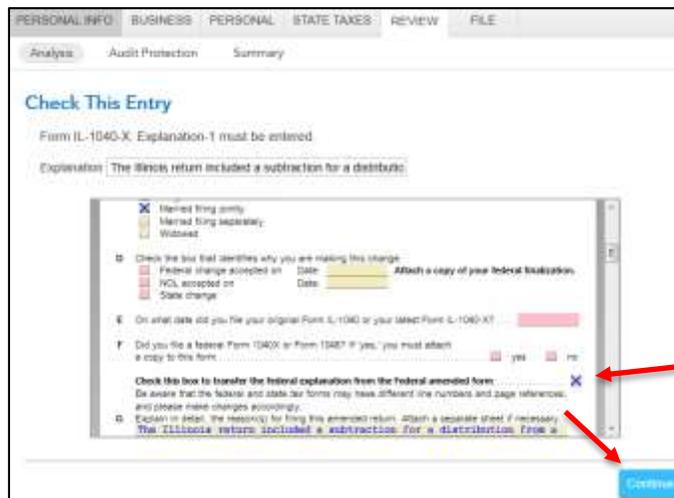


Note: At this point, if the IL refund box at the top of your screen says \$0, proceed to Step 19. If it shows an amount due, proceed to Step 8.

- 8) On the **Let's Check These Entries** screen, select **Check Entries**.



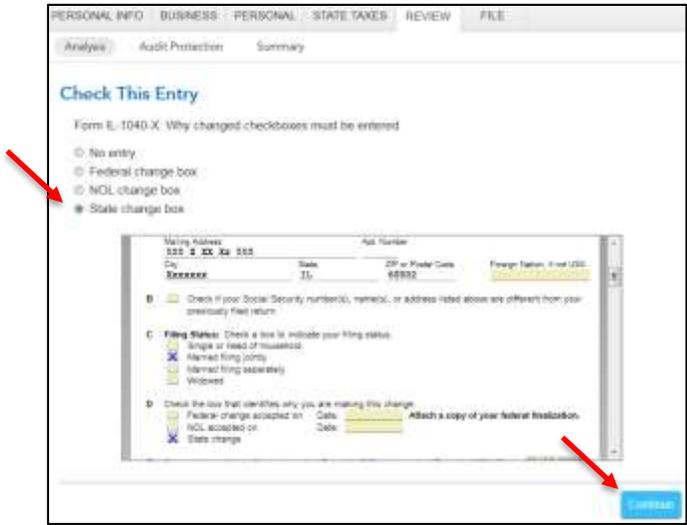
- 9) On the **Check This Entry** screen, select **Check this box to transfer the federal explanation from the Federal amended form**. By checking the box, it will automatically populate the explanation you entered on the previous screen. Then select **Continue**.



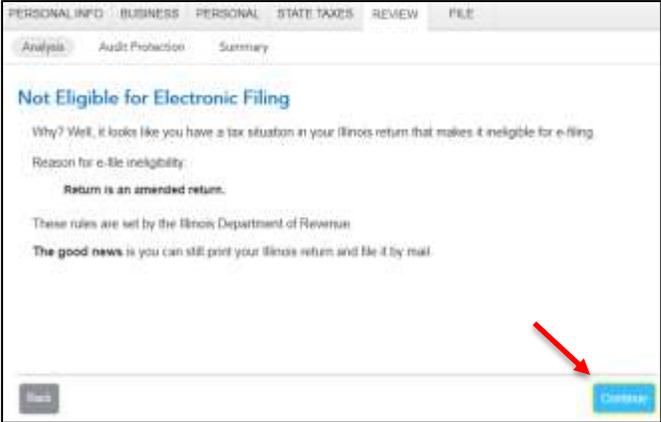
- 10) On the **Check This Entry** screen, select **IRS no box**. This indicates you are not filing an amended federal tax return. Then select **Continue**.

11) On the **Check This Entry** screen, enter the **Date last filed**. This is the date you filed your original Form IL-1040. Then select **Continue**.

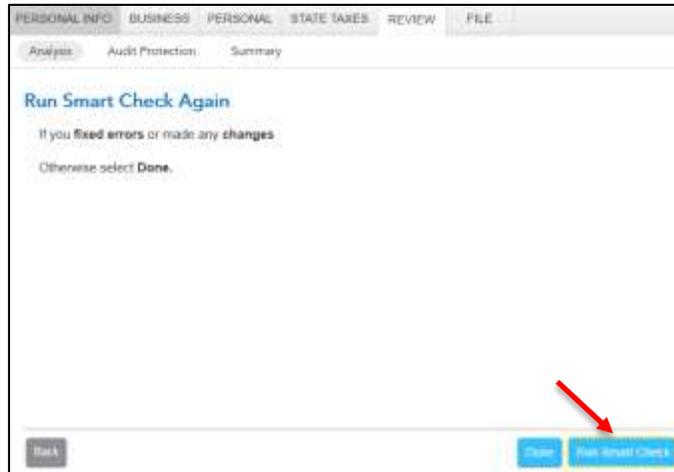
12) On the **Check This Entry** screen, select the **State change** box. This indicates the amendment is due to a change on the state return only. Then select **Continue**.



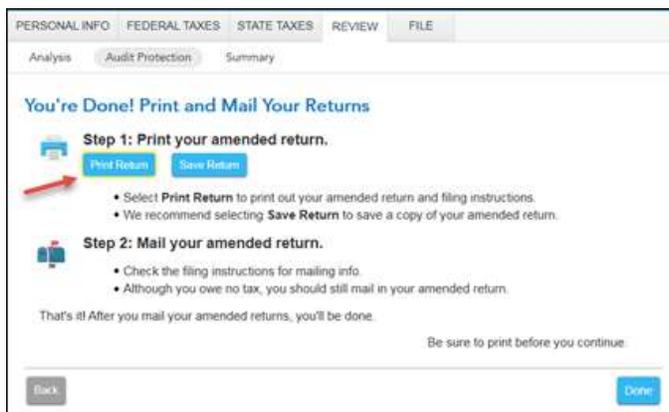
13) On the **Not Eligible for Electronic Filing** screen, select **Continue**.



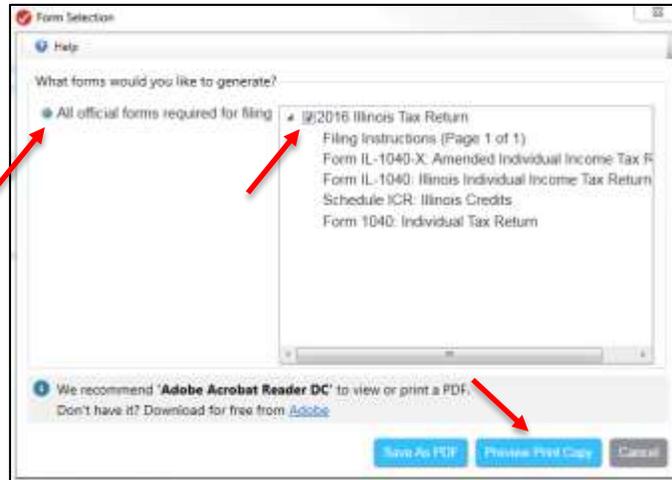
14) On the **Run Smart Check Again** screen, choose **Run Smart Check**. If there are any remaining errors, make necessary changes. The **Not Eligible for Electronic Filing** error will not go away. Once you have fixed any remaining errors select **Done**.



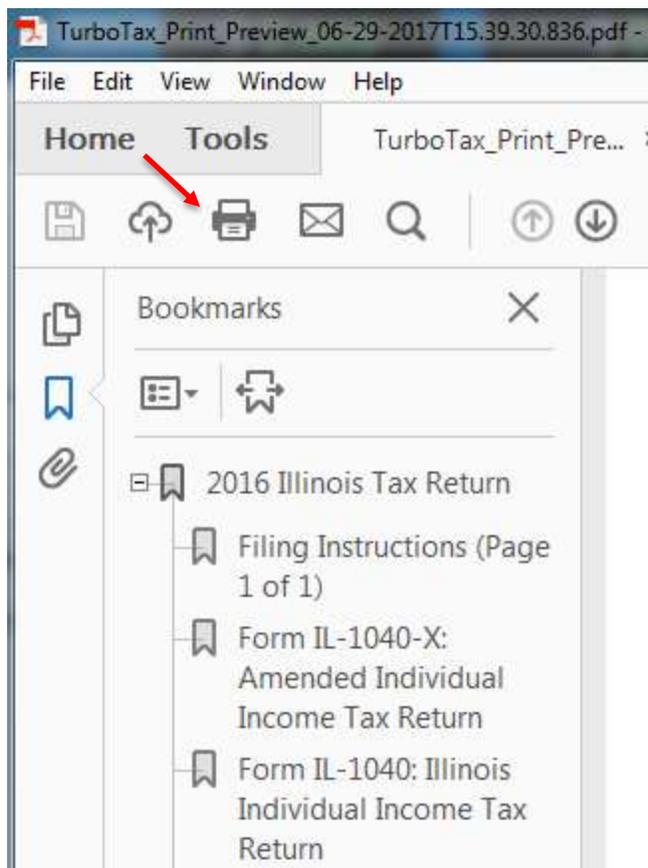
15) You are now ready to print your return to file. On the **You're Done! Print and Mail Your Returns** screen, select **Print Return**.



16) In the **Form Selection** window, select **All official forms required for filing**, check the box for your **Illinois** return. Then, select **Preview Print Copy**.



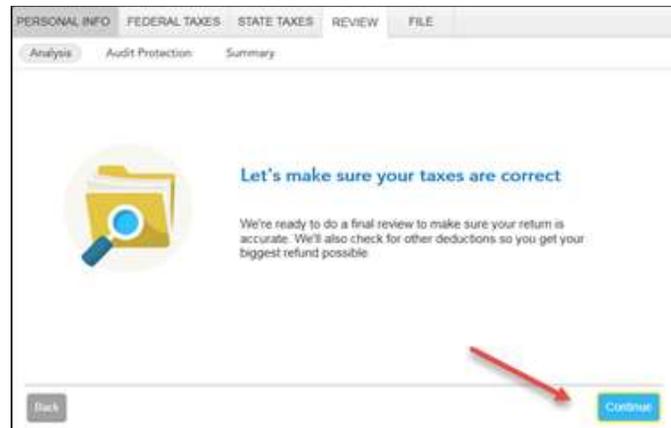
17) On the **Print Preview** screen, select the **Printer Icon** to print your forms.



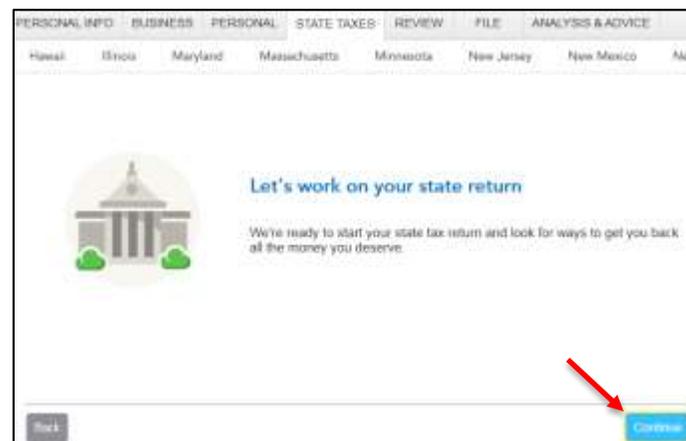
18) After printing your return,

- The instruction letter will indicate any balance due that you need to pay or refund that you will receive.
- The instructions will also tell you the address to mail your return.
- Be sure to print out an extra copy to keep for your files.

19) On the **Let's make sure your taxes are correct** screen, select the **State Taxes** tab.



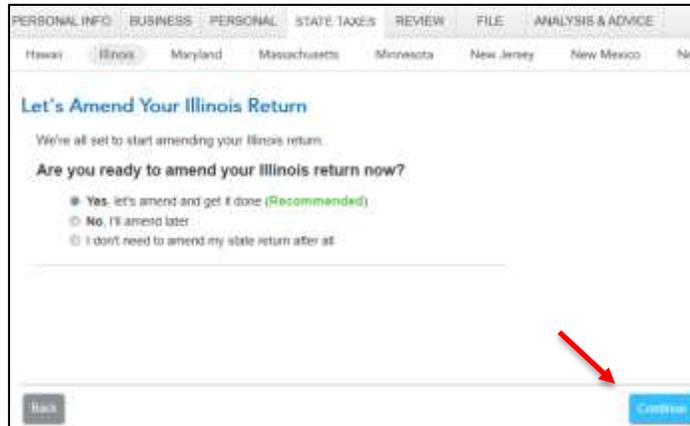
20) On the **Let's work on your state return** screen, select **Continue**.



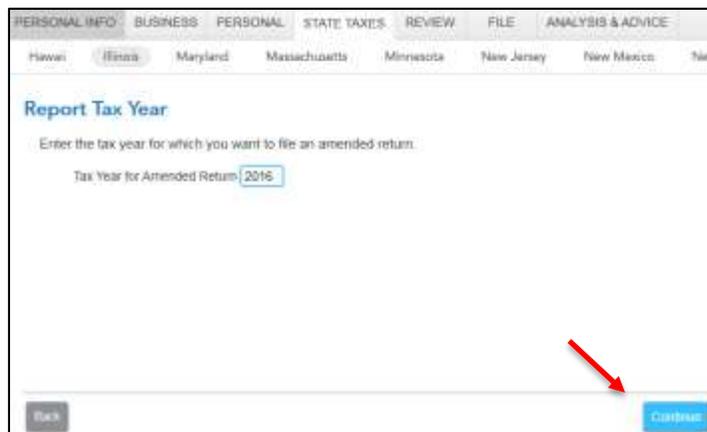
21) On the **Your State Returns** screen, click **Edit** next to **Illinois**.



22) On the **Let's Amend Your Illinois Return** screen, select **Yes, let's amend and get it done**. Then click **Continue**.



23) On the **Report Tax Year** screen, enter **2016** in the box. Then click **Continue**.



24) On the **Confirm Previous Refund or Tax Paid** screen, make sure the amount shown is correct. If it is not, delete it and enter the correct amount of tax paid or refund received with the original Illinois return. Then click **Continue**.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Hawaii **Illinois** Maryland Massachusetts Minnesota New Jersey New Mexico Nev

Confirm Previous Refund or Tax Paid

Before we complete your amended return, confirm your refund you originally received, or the tax you paid. Leave blank if none.

Illinois Refund Received With Previously Filed 2016 Return

Illinois Payment Made With Previously Filed 2016 Return

25) On the **About Your Illinois Amended Return** screen, select **Continue**.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Hawaii **Illinois** Maryland Massachusetts Minnesota New Jersey New Mexico Nev

About Your Illinois Amended Return

Use Form IL-1040-X below to correct an error on a previously filed return. Complete this form **after** you have filed the original return. [Learn more](#)

If you filed a form to amend your federal return, you must also file a form to amend your Illinois return, unless the changes do not affect your state taxes.

CAUTION: Save the original return using a different file name before proceeding.
See [Tax Help](#) for instructions and differences for completing an amended return for a current or prior year.

Read this information first:
For amended returns only. Check here if you are filing an amended return.

Step 1: Personal Information

A Enter your current Social Security numbers, names, and address.

Your Social Security No. 305-44-0000	Spouse's Social Security No. 305-44-0000	Your Last Name XXXXXX
Your First Name and Initial XXXXXX	Spouse's First Name and Initial (and last name - only if different) XXXXXX	

Mailing Address: 355 X XX Xx 555 Apt. Number: _____

City: XXXXXXX State: IL ZIP or Postal Code: 60000 Foreign Return: Not USA

26) On the **Let's Make Sure You're Ready to Review** screen, select **Yes, I've entered everything and let's review** and click **Continue**.

PERSONAL INFO BUSINESS PERSONAL STATE TAXES REVIEW FILE ANALYSIS & ADVICE

Hawaii Illinois Maryland Massachusetts Minnesota New Jersey New Mexico New York

Let's Make Sure You're Ready to Review

So far so good! We've now covered the main part of your Illinois amended return. Unless you have additional state amend info to enter, we're ready to move on and review.

Have you entered all of your state amend info?

Yes, I've entered everything and let's review

No, I still have state amend info to enter [How would I know this?](#)

Back Continue

Note: From this point, you will pick back up with instruction #8 and continue to print your amended return.