

(Keep for your records)

Name(s) as shown on return

Tax ID Number

Household Income Worksheet

Step 3 Applicable Household Income

1. Enter the amount from Form 540, line 17;
Form 540NR, line 17; or Form 540 2EZ, line 16 1 _____
2. Did you receive any tax-exempt interest? 2 _____
 - ☐ **Yes.** Use the worksheet below to determine the California tax-exempt interest and enter the amount on line 2.
 - ☐ **No.** Continue to the next question

California tax-exempt interest	
a. Enter the amount from Schedule CA (540), Part I, or Schedule CA (540NR), Part II, Section A, line 2a.	a _____
b. Enter the amount from Schedule CA (540), Part I, or Schedule CA (540NR), Part II, Section A, line 2b, column B.	b _____
c. Add line a and line b. Enter the subtotal here.	c _____
d. Enter the amount from Schedule CA (540), Part I, or Schedule CA (540NR), Part II, Section A, line 2b, column C.	d _____
e. Subtract line d from line c. This is your California tax-exempt interest. Enter this amount here and on line 2.	e _____

3. Did you claim any dependents?
 - ☐ **Yes.** If you answered **YES**, continue to Question 4.
 - ☐ **No.** If you answered **NO**, add line 1 and line 2. **This is your applicable household income.** Enter the result on Step 4, line 1.
4. Were any of the dependents you claimed required to file a tax return? 4 _____
 - ☐ **Yes.** Calculate each dependent's income by following Question 1 through Question 2 above. Add all dependent's income together and enter the total on line 4.
 - ☐ **No.** Add line 1 and line 2. **This is your applicable household income.** Enter the result on Step 4, line 1.
5. Did you attach form FTB 3803?
 - ☐ **Yes.** Continue to the next question
 - ☐ **No.** Add line 1, line 2, and line 4. **This is your applicable household income.** Enter the result on Step 4, line 1.
6. Is form FTB 3803, line 4, more than \$1,250? 6 _____
 - ☐ **Yes.** Add the amount from each form FTB 3803, line 1b, and the smaller of form FTB 3803, line 4 or \$2,500. Enter the amount(s) on line 6.
 - ☐ **No.** Enter -0- on line 6. Continue to the next question.
7. Add line 1, line 2, line 4, and line 6. **This is your applicable household income.** Enter the result on Step 4, line 1.