

City of Montgomery Tax Office
 10101 Montgomery Road
 Montgomery, OH 45242
 Phone: 513-891-2424
 Fax: 513-891-2994
 www.montgomeryohio.org

City of Montgomery Individual Income Tax Return 2015

Tax Office use only

- Due on or before April 18, 2016. Filing is mandatory even if no tax due
- A minimum penalty of \$25 will be assessed for late filing of this return
- Make check or money order payable to The City of Montgomery
- If amount due is less than \$1.01, no payment is due
- No refunds under \$1.01.

Account Number _____

SS# Mr. _____

SS# Mrs/Ms _____

Phone: Home _____ Other _____

Email address: _____

If moved in or out of Montgomery during current year, please give date of move:

Moved in: _____ Moved out: _____

Attach all forms to the back of this page

- Qualifying wages - see instructions on page 2 \$ _____
Attach W-2 form(s), and page one of the Federal 1040, as well as any Federal schedules for amounts shown on Lines 12, 17, 18 and 21.
- Less Nontaxable Income - see instructions on page 2 (Provide calculations for part-year residency and/or attach form 2106).. \$ _____
- Taxable qualifying wages: (Line 1 minus Line 2) \$ _____
- Other income (from Page 2) \$ _____
- Taxable income (Line 3 plus Line 4) **Business losses may not offset W-2 Income from Line 3** \$ _____
- Montgomery tax (1% of Line 5) \$ _____
- Credits
 - Montgomery tax withheld per W-2(s) \$ _____
 - 2015 estimated tax paid to Montgomery \$ _____
 - 2015 tax paid to City or Village of _____ see instructions on page 2..... \$ _____
 - Prior year overpayment \$ _____
 - Total credits (Line 7a through 7d) \$ _____
- If Line 6 is greater than Line 7e, payment of balance must accompany this return..... **2015 Tax Due** \$ _____
- If Line 6 is less than Line 7e, overpayment is to be refunded \$ _____ or credited \$ _____ to next year's estimate

Late filing penalty \$ _____ Penalty on taxes due \$ _____ Interest on taxes due \$ _____ Total: _____



Card # _____ Exp Date: _____ Verification Code _____

Declaration of Estimated Tax for Year 2016—MANDATORY IF ESTIMATED TAX IS \$200 OR GREATER

- Total income subject to tax \$ _____ multiply by tax rate of 1% for gross tax of..... \$ _____
- Less expected tax credits
 - Withheld by employer for Montgomery, (not to exceed 1% of that portion taxed) \$ _____
 - Payments to another municipality, (not to exceed 1% of that portion taxed) \$ _____
- Net estimated tax due for 2016 (Line 10 less Line 11a and 11b) Note: 90% of tax liability due by December 15, 2016 \$ _____
- First Quarter Estimate Payment
 - Amount due with this declaration (not less than 22.5% of Line 12)..... \$ _____
 - Less overpayment credit from prior year (from Line 9 above) \$ _____
 - Net First Quarter Estimate payment \$ _____
- Total enclosed payment (Line 8 plus Line 13c) \$ _____

May we contact your preparer directly? Yes ___ No ___ Preparer name and phone: _____

I certify that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief it is true, correct and complete. If prepared by a person other than taxpayer, the declaration is based on all information of which preparer has any knowledge.

Signature of Person Preparing, if other than Taxpayer _____ Date _____

Signature of Taxpayer _____ Date _____

Preparer's Address and Phone _____

Signature of Taxpayer _____ Date _____

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To be completed only by those who have taxable income other than wages.

- 15. Income not reported on W-2 form(s) or Schedule C...
16. Net profit (loss) from profession and/or business operation...
17. Net profit (loss) from rents*, partnership(s), farming, estates, trusts, etc.
18. Total net profit (loss) from business activities...
19. Business loss total from previous tax returns...
20. Subtotal Line 18 and Line 19
21. Net other taxable income...

Exemptions from filing: Any person under 18 years of age who has not previously filed a return and has no earned income; or any retired person who has previously filed a return establishing retired status with the City's tax office and who will continue to have no earned income.

Instructions

(For complete line-by-line instructions in more detail, visit our website at www.montgomeryohio.org and click on Tax Forms)

This form is to be used by individuals who receive income reported on Federal Forms W-2, W-2G, Form 5754, 1099-MISC, or Federal Schedules C, E, F or K-1. Individuals who file as Sole Proprietors of Single Member LLCs should also use this form.

- LINE 1: List total of all qualifying wages from all W-2 forms. "Qualifying" wages: generally includes amounts reported in the Medicare wage base; and compensation of pre-1986 employees exempt from Medicare solely because of the Medicare grandfathering provision.
LINE 2: Deductible expenses: Allowable only on wages taxable to Montgomery. Attach Federal Form 2106 for unreimbursed employee business expenses included in qualifying wages (Line 1).
LINE 4: All other taxable income. (From Page 2 - includes Federal 1040, Line 21 income).
LINE 7c: Credit for tax withheld and paid to another municipality may not exceed 1% of those wages actually taxed.
LINE 8: Balance of tax due must accompany return.
LINE 9: Overpayment will be applied to 2016 estimate unless a refund is requested in writing.
LINE 10: Estimate 2016 income: multiply estimated income by 1%.
LINE 13a: You may pay the full amount of estimated tax with the filing of this form.
LINE 14: Total of payment accompanying return (Line 6 plus Line 11c).
LINE 15: Enter any taxable income not reported on W-2 form(s).
LINE 16: Attach copy of Federal Schedule(s) C.
LINE 17: Attach copy of Federal Schedule(s) E, Schedule F, and/or K-1 form(s).
LINE 19: Business losses may not be used to offset W-2 wages or other compensation.
LINE 21: Net other taxable income. Enter on Page 1, Line 4.

Examples of deductions that are NOT allowed: Individual Retirement Account (IRA); Simplified Employee Pension (SEP) plan; Keogh (H.R. 10) Retirement Plan.

Extension Policy: Extension requests must be received by the Montgomery Tax Office on or before April 18, 2016. The City of Montgomery Tax Office accepts a copy of the Federal Extension form as an extension request. Only those extension requests received in duplicate with a self-addressed, postpaid envelope will have a copy returned after being appropriately marked.

Filing an extension does not grant an extension of time to pay. 90% of tax liability is due by December 15, 2016.

Note: Unless accompanied by W-2 form(s), Federal 1040 form and pertinent schedules, payment of the balance of the 2015 tax declared due (Line 8) and at least 22.5% of the estimated tax for 2016, this form is not a complete legal final return or declaration.