Please do not use staples.

Ohio | Department of Taxation

11000101

Please use only black ink.

Taxable year beginning in **2011**

IT 1040 Rev. 9/11
Individual Income Tax Return

Taxpayer Social Security no. (required) ▸▸ 003 If deceased 310p check box

Spouse's Social Security no. (only if joint return) ▸▸ 055 If deceased 310q check box

Use UPPERCASE letters.

Your first name 070a M.I. 070b Last name 060a

Spouse's first name (only if joint return) 070c M.I. 070d Last name 065a

Mailing address (for faster processing, please use a street address) 075/DOMESTIC (077/FOREIGN)

City 085/DOMESTIC (087/FOREIGN) State 095 ZIP code 100 County (first four letters) 105

Home address (if different from mailing address) – please do **NOT** show city or state 315a ZIP code 315b County (first four letters)

Foreign country (please provide this information if the mailing address is outside the U.S.) 098 Foreign postal code

310m310e310f

Ohio Residency Status – Check applicable box

☐ Full-year resident ☐ Part-year resident ☐ Nonresident Indicate state ▸▸ 310j

Check applicable box for spouse (only if married filing jointly) 310g

☐ Full-year resident ☐ Part-year resident ☐ Nonresident Indicate state ▸▸ 310k

Filing Status – Check one (as reported on federal income tax return)

☐ Single or head of household or qualifying widow(er)

☐ Married filing jointly

☐ Married filing separately (enter spouse's SS#) ▸▸ 055

Ohio Political Party Fund

	Yes	No
Do you want $1 to go to this fund?	☐	☐
If joint return, does your spouse want $1 to go to this fund?	☐	☐

Note: Checking "Yes" will not increase your tax or decrease your refund.

Ohio School District Number for 2011 (see pages 43-48 of the instructions) 110

Please do not use staples, tape or glue. Place your W-2(s), check (payable to Ohio Treasurer of State) and Ohio form IT 40P on top of your return. Include forms W-2G and 1099-R if tax was withheld. Place any other supporting documents or statements after the last page of your return.

Go paperless. It's FREE! Visit *tax.ohio.gov* to try Ohio I-File.

Most electronic filers receive their refunds in 5-7 business days by direct deposit!

INCOME AND TAX INFORMATION – If amount is negative, shade the negative sign ("–") in the box provided.

1. **Federal adjusted gross income** (from IRS form 1040, line 37; 1040A, line 21; 1040EZ, line 4; 1040NR, line 36; or 1040NR-EZ, line 10)	1.	350.00
2. Adjustments from line 47 on page 3 of Ohio form IT 1040 **(enclose page 3)**	2.	355.00
3. Ohio adjusted gross income (line 2 added to or subtracted from line 1)	3.	360.00
4. Personal exemption and dependent exemption deduction – multiply your personal and dependent exemptions 310l times $1,650 and enter the result here	4.	365.00
5. Ohio taxable income (line 3 minus line 4; enter -0- if line 3 is less than line 4)	5.	370.00
6. Tax on line 5 (see tax tables on pages 35-41 of the instructions)	6.	375.00
7. Schedule B credits from line 57 on page 4 of Ohio form IT 1040 **(enclose page 4)**	7.	380.00
8. Ohio tax less Schedule B credits (line 6 minus line 7; enter -0- if line 6 is less than line 7)	8.	385.00
9. Exemption credit: Number of personal and dependent exemptions 310l times $20	9.	390.00
10. Ohio tax less exemption credit (line 8 minus line 9; enter -0- if line 8 is less than line 9)	10.	395.00

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Taxable year beginning in **2011**

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10a. Amount from line 10 on page 1 ..... 10a. 400.00

11. Joint filing credit. See the instructions on page 20 for eligibility and documentation requirements (this credit is for married filing jointly status only). _____ % times line 10a **(limit $650)** 11. 405.00

12. Ohio income tax less joint filing credit (line 10a minus line 11) 12. 410.00

13. Total credits from line 69 on page 4 of Ohio form IT 1040 **(enclose page 4)** 13. 415.00

14. Manufacturing equipment grant. You must include the grant request form 14. 420.00

15. Ohio income tax (line 12 minus lines 13 and 14; enter -0- if the total of lines 13 and 14 is more than line 12) 15. 425.00

16. Interest penalty on underpayment of estimated tax. Enclose Ohio form IT/SD 2210 (see page 21 of the instructions) 16. 430.00

17. Unpaid Ohio use tax (see the worksheet on page 33 of the instructions) 17. 435.00

18. Total Ohio tax liability (add lines 15, 16 and 17) ..... **TOTAL TAX** ▸ 18. 440.00

19. Ohio tax withheld (box 17 on your W-2; box 14 on your W-2G; and box 12 on your 1099-R). Place W-2(s), W-2G(s) and 1099-R(s) on top of this return ..... **AMOUNT WITHHELD** ▸ 19. 445.00

20. 2010 overpayment credited to 2011, 2011 est. tax payments and any other 2011 tax payments 20. 450.00

21. Refundable credits. Include certificate(s) and K-1(s):

a. Business jobs credit 455.00

b. Pass-through entity credit 460.00

c. Historic preservation credit 465.00

d. Motion picture production credit 470.00

22. Add lines 19, 20 and 21a, b, c and d ..... **TOTAL PAYMENTS** ▸ 22. 480.00

If line 22 is MORE THAN line 18, go to line 23. If line 22 is LESS THAN line 18, skip to line 27.

23. If line 22 is MORE THAN line 18, subtract line 18 from line 22 ..... **AMOUNT OVERPAID** ▸ 23. 485.00

24. Amount of line 23 to be credited to 2012 income tax liability ..... **CREDIT TO 2012** ▸ 24. 490.00

25. Amount of line 23 that you wish to **donate** to the following fund(s):

a. Military injury relief 495.00

b. Natural areas/endangered species 500.00

c. Wildlife species/endangered wildlife 505.00

d. **NEW** – Ohio Historical Society 510.00

26. Line 23 minus the sum of lines 24 and 25a, b, c and d. Enter here, then skip to line 28 ..... 26. 525.00

27. If line 22 is LESS THAN line 18, subtract line 22 from line 18 ..... **AMOUNT DUE** ▸ 27. 530.00

28. Interest and penalty due on late-paid tax and/or late-filed return (see page 22 of the instructions) ..... **INTEREST AND PENALTY** ▸ 28. 535.00

If you entered an amount on line 26, skip to line 30. If you entered an amount on line 27, go to line 29.

29. Amount due plus interest and penalty (add lines 27 and 28). If payment is enclosed, make check payable to Ohio Treasurer of State and include Ohio form IT 40P (see our Web site at **tax.ohio.gov**) ..... **AMOUNT DUE PLUS INTEREST AND PENALTY** ▸ 29. 540.00

30. Refund less interest and penalty (line 26 minus line 28). Enter the amount here. (If line 28 is more than line 26, you have an amount due. Subtract line 26 from line 28 and enter this amount on line 29.) ..... **YOUR REFUND** ▸ 30. 545.00

If your refund is less than $1.01, no refund will be issued. If you owe less than $1.01, no payment is necessary.

SIGN HERE (required) – See page 4 of this return for mailing information.

I have read this return. Under penalties of perjury, I declare that, to the best of my knowledge and belief, the return and all enclosures are true, correct and complete. 310o

▸ 120
Your signature — Date

▸ 125
Spouse's signature (see page 10 of the instructions) — Phone number (optional)

300b / 300d — 300c

Preparer's name (please print; see page 11 of the instructions) — Phone number

Do you authorize your preparer to contact us regarding this return? ☐ Yes ☐ No 310r

For Department Use Only

Code

If line 2 (on page 1) is -0- or blank, do not mail page 3.

Ohio Department of Taxation

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Taxable year beginning in **2011**

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Individual Income Tax Return

SCHEDULE A – Income Adjustments (Additions and Deductions)

Additions (add income items only to the extent not included on page 1, line 1).

31.	Non-Ohio state or local government interest and dividends	550.00
32.	Certain pass-through entity Ohio taxes paid and Ohio Revised Code section 5733.40(A) pass-through entity adjustment	555.00
33a.	Federal interest and dividends subject to state taxation	560.00
b.	Reimbursement of college tuition expenses and fees deducted in any previous year(s) and noneducation expenditures from college savings account	565.00
c.	Losses from sale or disposition of Ohio public obligations	570.00
d.	Nonmedical withdrawals from an Ohio medical savings account	575.00
e.	Reimbursement of expenses previously deducted for Ohio income tax purposes, but only if the reimbursement is not in federal adjusted gross income	580.00
f.	Lump sum distribution add-back and miscellaneous federal income tax adjustments	585.00
g.	5/6 adjustment for IRC section 168(k) and 179 depreciation expense	590.00
34.	**Total additions** (add lines 31 through 33g and enter here). You must complete the applicable line items above	595.00

Deductions (deduct income items only to the extent included on page 1, line 1).

35a.	Federal interest and dividends exempt from state taxation	600.00
b.	Adjustment for Internal Revenue Code sections 168(k) and 179 depreciation expense	605.00
36.	Employee compensation earned in Ohio by full-year residents of neighboring states and certain income earned by military nonresidents and civilian nonresident spouses (see instructions)	610.00
37a.	Military pay for Ohio residents, but only if the military pay is included on line 1 of this return and is received while the military member was stationed outside Ohio	615.00
b.	Military retirement income and military injury relief fund amounts included in federal adjusted gross income (line 1 on page 1)	620.00
38a.	State or municipal income tax overpayments shown on IRS form 1040, line 10	625.00
b.	Refund or reimbursements shown on IRS form 1040, line 21 for itemized deductions claimed on a prior year federal income tax return	630.00
c.	Repayment of income reported in a prior year and miscellaneous federal tax adjustments	635.00
39.	Disability and survivorship benefits (do not include pension continuation benefits)	640.00
40.	Qualifying Social Security benefits and certain railroad retirement benefits	645.00
41.	Education: Ohio 529 contributions; tuition credit purchases; and limited taxable grant amounts	650.00
42.	Certain Ohio National Guard reimbursements and benefits	655.00
43a.	Unreimbursed long-term care insurance premiums, unsubsidized health care insurance premiums and excess health care expenses (see worksheet on page 27 of the instructions)	660.00
b.	Funds deposited into, and earnings of, a medical savings account for eligible health care expenses (see worksheet on page 28 of the instructions)	665.00
c.	Qualified organ donor expenses **(maximum $10,000 per taxpayer)** and amounts contributed to an individual development account	670.00
44.	Wage expense not deducted due to the targeted jobs or the work opportunity tax credits	675.00
45.	Interest income from Ohio public obligations and from Ohio purchase obligations; gains from the sale or disposition of Ohio public obligations; public service payments received from the state of Ohio or income from a transfer agreement	680.00
46.	**Total deductions** (add lines 35a through 45). You must complete the applicable line items above	695.00
47.	Net adjustments – If line 34 is MORE THAN line 46, **enter the difference here and on line 2 as a positive amount.** If line 34 is LESS THAN line 46, **enter the difference here and on line 2 as a negative amount**	700.00

If line 7 (page 1) and line 13 (page 2) are both -0- or blank, do not mail page 4.

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Taxable year beginning in **2011**

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Individual Income Tax Return

SCHEDULE B – Nonbusiness Credits

48. Retirement income credit **(limit $200 per return).** See the table on page 29 of the instructions	48.	705.00
49. Senior citizen credit (you must be 65 or older to claim this credit; **limit $50 per return**)	49.	710.00
50. Lump sum distribution credit (you must be 65 or older to claim this credit)	50.	715.00
51. Child care and dependent care credit (see the worksheet on page 29 of the instructions)	51.	720.00
52. Lump sum retirement credit	52.	725.00
53. If line 5 on page 1 is $10,000 or less, enter $88; otherwise, enter -0- or leave blank	53.	730.00
54. Displaced worker training credit (see the instructions and worksheet on page 30) **(limit $500 per taxpayer)**	54.	735.00
55. Ohio political contributions credit **(limit $50 per taxpayer)**	55.	740.00
56. Ohio adoption credit **($1,500 per child adopted during the year)**	56.	745.00
57. Total Schedule B credits (add lines 48 through 56). **Enter here and on page 1, line 7**	57.	750.00

SCHEDULE C – Full-Year Ohio Resident Credit

58. Enter the portion of line 3 on page 1 subjected to tax by other states or the District of Columbia while you are an Ohio resident (limits apply – see page 30 of the instructions)	58.	755.00
59. Enter Ohio adjusted gross income (line 3 on page 1)	59.	760.00
60. Divide line 58 by line 59 and enter the result here (four digits; do not round). . Multiply this factor by the amount on line 12 on page 2 and enter the result here	60.	765.00
61. Enter the 2011 income tax, less all credits other than withholding and estimated tax payments and overpayment carryforwards from previous years, paid to other states or the District of Columbia (limits apply – see page 31 of the instructions)	61.	770.00
62. Enter the smaller of line 60 or line 61. This is your Ohio resident tax credit. Enter here and on line 67 below. If you filed a return for 2011 with a state(s) other than Ohio, enter the two-letter state abbreviation in the box(es) below	62.	775.00

SCHEDULE D – Nonresident / Part-Year Resident Credit (date of part-year residency 310h to 310j)

63. Enter the portion of Ohio adjusted gross income (line 3) that was not earned or received in Ohio. Include Ohio form IT 2023 if required (see page 31 of the instructions)	63.	780.00
64. Enter the Ohio adjusted gross income (line 3 on page 1)	64.	785.00
65. Divide line 63 by line 64 and enter the result here (four digits; do not round). . Multiply this factor by the amount on line 12. Enter here and on line 68 below	65.	790.00

SUMMARY OF CREDITS FROM SCHEDULES C, D AND E

66. Enter the amount from line 10 of Schedule E, Nonrefundable Business Credits (see page 31 of the instructions)	66.	795.00
67. Enter the amount from line 62 above	67.	800.00
68. Enter the amount from line 65 above	68.	805.00
69. Add lines 66, 67 and 68. **Enter here and on page 2, line 13**	69.	810.00

MAILING INFORMATION

NO Payment Enclosed – Mail to:
Ohio Department of Taxation
P.O. Box 2679
Columbus, OH 43218-2679

Enclose your federal income tax return if line 1 on page 1 of this return is -0- or negative.

Payment Enclosed – Mail to:
Ohio Department of Taxation
P.O. Box 2057
Columbus, OH 43218-2057