



# 2011 - MASON INCOME TAX RETURN - 2011

**FILE ON OR BEFORE APRIL 17, 2012 – FILING REQUIRED EVEN IF NO TAX IS DUE.**

LATE FILING AND/OR LATE PAYMENT OF TAX DUE SUBJECTS YOU TO A MINIMUM \$20 PENALTY  
90% OF THE TAX MUST BE PAID BY JANUARY 31, 2012 TO AVOID PENALTY AND INTEREST

Phone: (513) 229-8535  
Fax: (513) 229-8531  
www.imagemason.org

Make checks payable to:  
**CITY OF MASON  
TAX OFFICE**

SOCIAL SECURITY # \_\_\_\_\_

SPOUSE'S SS # \_\_\_\_\_

DID YOU FILE A MASON RETURN LAST YEAR?  YES  NO

ARE YOU A FULLTIME STUDENT?  YES  NO

ARE YOU A NEW RESIDENT/FIRST YEAR FILER?  YES  NO

IF YOU MOVED DURING THE YEAR:

PRIOR ADDRESS \_\_\_\_\_

DATE MOVED TO MASON \_\_\_\_\_

DATE MOVED FROM MASON \_\_\_\_\_

CITY OF RESIDENCE \_\_\_\_\_

RESIDENT  NON-MASON RESIDENT

TAXPAYER'S NAME AND ADDRESS \_\_\_\_\_

**FILING STATUS**

- Single
- Married filing joint return (even if only one had income). Did you file a joint or separate return last year?  Joint  Separate
- Married filing separate return. Enter spouse's social security number above and full name here. ► \_\_\_\_\_

**INCOME**



PLEASE REFER TO LINE-BY-LINE INSTRUCTIONS BEFORE PROCEEDING

- 1. Total Wages from Page 2, Worksheet A, Line E, Column 1 (**W-2s MUST BE ATTACHED**)..... 1 \$ \_\_\_\_\_
- 2. Total 2106 Expenses from Page 2, Worksheet A, Line E, Column 2 (**MUST ATTACH FEDERAL FORM 2106**) 2 \$ \_\_\_\_\_
- 3. Part-year Resident Adjustment (**ATTACH JUSTIFICATION**)..... 3 \$ \_\_\_\_\_
- 4. TAXABLE WAGES. SUBTRACT LINE 2 AND LINE 3 FROM LINE 1 (**ATTACH PAGE 1 OF FEDERAL RETURN**) ..... 4 \$ \_\_\_\_\_
- 5. Total other income from Page 2, Worksheet B, Line 6 (**IF LOSS, ENTER 0 AND ATTACH FEDERAL SCHEDULES**) 5 \$ \_\_\_\_\_
- 6. MASON TAXABLE INCOME. (ADD LINES 4 AND 5) ..... 6 \$ \_\_\_\_\_

**TAX**

- 7. MASON INCOME TAX. MULTIPLY LINE 6 BY 1.0% (.01) ..... 7 \$ \_\_\_\_\_

**TAX WITHHELD, PAYMENTS AND CREDITS**

- 8. Total Mason income tax withheld from Page 2, Worksheet A, Line E, Column 4 ..... 8 \$ \_\_\_\_\_
- 9. a. Credit for Taxes Withheld to Other Cities (from pg.2, Worksheet A, Line E, Column 6) 9a \$ \_\_\_\_\_
- b. Credit for Taxes Paid to Other Cities from Page 2, Worksheet C, Line C ..... 9b \$ \_\_\_\_\_
- c. Enter on Line 9 total of 9a plus 9b. (Not to Exceed 0.01 Times the Portion of Income Taxable to Another Municipality)..... 9 \$ \_\_\_\_\_
- 10. Prior year overpayments..... 10 \$ \_\_\_\_\_
- 11. Estimated payments ..... 11 \$ \_\_\_\_\_
- 12. TOTAL PAYMENTS AND CREDITS. ADD LINES 8 THROUGH 11 ..... 12 \$ \_\_\_\_\_

**BALANCE DUE, REFUND OR CREDIT**

- 13. **TAX DUE.** If line 7 is more than 12, enter tax due here (See Line-By-Line Instructions) ..... 13 \$ \_\_\_\_\_
- 14. Penalty: late filing or payment penalty, see General Information (N) ..... 14 \$ \_\_\_\_\_
- 15. Interest. See General Information (O) ..... 15 \$ \_\_\_\_\_
- 16. **TOTAL DUE.** (Add lines 13 through 15) (enter 0 if less than \$1) ..... 16 \$ \_\_\_\_\_
- 17. OVERPAYMENT. If line 7 is less than line 12, enter result less P&I if any ..... 17 \$ \_\_\_\_\_
- 18. AMOUNT FROM LINE 17 TO BE CREDITED TO NEXT YEAR ..... 18 \$ \_\_\_\_\_
- 19. AMOUNT FROM LINE 17 TO BE REFUNDED (No refund if less than \$1) ..... 19 \$ \_\_\_\_\_

**DECLARATION OF ESTIMATED TAX FOR 2012**

**ESTIMATE FOR NEXT YEAR**

- 20. TOTAL INCOME SUBJECT TO TAX \$ \_\_\_\_\_ MULTIPLY BY TAX RATE OF 1.0% (.01) ..... 20 \$ \_\_\_\_\_
- 21. TAX WITHHELD
  - a. FOR THE CITY OF MASON ..... \$ \_\_\_\_\_
  - b. TOTAL INCOME TAXED BY ANOTHER CITY \$ \_\_\_\_\_ MULTIPLY BY 1% ..... \$ \_\_\_\_\_
  - TOTAL CREDIT FOR TAX WITHHELD (LINE 21a PLUS LINE 21b) ..... 21 \$ \_\_\_\_\_
- 22. NET ESTIMATED TAX LIABILITY (subtract line 21 from line 20) NOTE: **90% of YOUR ACTUAL TAX LIABILITY must be paid by January 31, 2013, to avoid a penalty.** ..... 22 \$ \_\_\_\_\_
- 23. ENTER PRIOR YEAR CARRYOVER CREDIT FROM LINE 18 ABOVE. .... 23 \$ \_\_\_\_\_
- 24. SUBTRACT LINE 23 FROM LINE 22 (ESTIMATED TAX FOR 2012) ..... 24 \$ \_\_\_\_\_
- 25. FIRST QUARTER ESTIMATED PAYMENT (LINE 24 DIVIDED BY 4)\* ..... 25 \$ \_\_\_\_\_

**TOTAL DUE**

- 26. Enter balance due from line 16 above (enter 0 if less than \$1.00) ..... 26 \$ \_\_\_\_\_
- 27. **TOTAL TAX DUE. ADD LINES 25 & 26. PLEASE MAKE CHECKS PAYABLE TO CITY OF MASON TAX OFFICE ..** 27 \$ \_\_\_\_\_

\*First Quarter Estimate included here. The 2nd, 3rd and 4th Quarter Courtesy Coupons are included in the packet.

The undersigned declares that this return (and accompanying schedules) is a true, correct and complete return for the taxable period stated and that the figures used herein are the same as used for Federal Income Tax purposes.

SIGNATURE OF TAXPAYER (REQUIRED) \_\_\_\_\_ DATE \_\_\_\_\_ E-MAIL \_\_\_\_\_

SIGNATURE OF SPOUSE (REQUIRED IF JOINT RETURN) \_\_\_\_\_ PHONE # \_\_\_\_\_

SIGNATURE OF PREPARER, IF OTHER THAN TAXPAYER \_\_\_\_\_ DATE \_\_\_\_\_ E-MAIL \_\_\_\_\_

NAME AND ADDRESS OF PREPARER \_\_\_\_\_ PHONE # \_\_\_\_\_

MAY THE MASON TAX OFFICE DISCUSS THIS RETURN WITH THE PREPARER SHOWN?  YES  NO  
MAY THE MASON TAX OFFICE COMMUNICATE WITH YOU VIA THE ABOVE E-MAIL ADDRESS?  YES  NO

**TO PAY BY CREDIT CARD:** Enter number and expiration date fully and accurately.

NO. | | | | | | | | | | | | | | | | | | | | | |

NO. | | | | | | | | | | | | | | | | | | | | | |

EXP. DATE / / AMOUNT AUTHORIZED: \$ \_\_\_\_\_

PHONE NUMBER: (H) \_\_\_\_\_ (W) \_\_\_\_\_

CARDHOLDER SIGNATURE: \_\_\_\_\_

ATTACH W-2'S HERE

**WORKSHEET A SALARIES, WAGES, TIPS AND OTHER EMPLOYEE COMPENSATION PER W-2(S) (PLEASE SEE THE LINE-BY-LINE INSTRUCTIONS)**

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5	COLUMN 6
NAME OF EMPLOYER	MEDICARE WAGES W-2 (BOX 5) IF BOX 5 BLANK, USE BOX 18	2106 EXPENSES, IF ANY (SEE GENERAL INFORMATION (I))	CITY WHERE EMPLOYED W-2 (BOX 20)	MASON TAX WITHHELD W-2 (BOX 19)	LOCAL WAGES (OTHER THAN MASON) W-2 (BOX 18) CANNOT EXCEED BOX 5	CREDIT FOR TAXES WITHHELD OTR CITIES (COLUMN 5 LESS COLUMN 2 X 1%)
A.						
B.						
C.						
D.						
E. TOTALS, IF NONE ENTER 0						
	PAGE 1, LINE 1	PAGE 1, LINE 2		PAGE 1, LINE 8		PAGE 1, LINE 9A

- PLEASE RETURN TO LINE-BY-LINE INSTRUCTIONS AFTER COMPLETING WORKSHEET A
- 2011 REFUND FROM ANOTHER CITY? PLEASE PROVIDE DOCUMENTATION.

**WORKSHEET B - OTHER TAXABLE INCOME (SEE GENERAL INFORMATION L AND LINE-BY-LINE INSTRUCTIONS)**

- NET PROFIT/LOSS FROM BUSINESS (SCHEDULE C) AND FARMING (SCHEDULE F)**
  - Total Business Income or (Loss) per Form 1040, Line 12 (Attach all Federal Schedule C's) ..... a. \_\_\_\_\_
  - Total Farm Income or (Loss) per Form 1040, Line 18 (Attach all Federal Schedule F's) ..... b. \_\_\_\_\_
  - Total (Add a plus b) ..... c. \_\_\_\_\_
  - Percentage Taxable to Mason (Full Year Residents Enter 100%)..... d. \_\_\_\_\_ %
  - Amount Subject To Tax (Multiply c times d) ..... **Total (B-1)** e. \_\_\_\_\_
- SUPPLEMENTAL INCOME AND LOSS (Attach all Schedule E's)**
  - Net Rental Income or (Loss) ..... a. \_\_\_\_\_
  - Net Income (Loss) from Partnerships, S-Corporations, Estates and Trusts, Other ..... b. \_\_\_\_\_
  - Total Schedule E Income (Loss) (Add a and b) (Should Agree with Line 17 Form 1040) (Attach all Federal Schedule E's) .. c. \_\_\_\_\_
  - Percentage Taxable to Mason (Full Year Residents Enter 100%)..... d. \_\_\_\_\_ %
  - Amount Subject To Tax (Multiply c times d) ..... **Total (B-2)** e. \_\_\_\_\_
- TOTAL OTHER INCOME NOT INCLUDED ABOVE (Attach all Applicable Schedules)**
  - Total 1099-Misc Income Not Included in Federal Schedule C ..... a. \_\_\_\_\_
  - Other (Explain) ..... b. \_\_\_\_\_
  - Amount Subject To Tax (Add a plus b) ..... **Total (B-3)** c. \_\_\_\_\_
- TAXABLE INCOME BEFORE PRIOR YEAR LOSSES (TOTAL B-1+TOTAL B-2+TOTAL B-3) ..... Sub-Total (B-4) \_\_\_\_\_**
- PRIOR YEAR LOSSES CARRIED FORWARD AND USED IN CURRENT YEAR**
  - YEARS 2006 ( \_\_\_\_\_ ) + 2007 ( \_\_\_\_\_ ) + 2008 ( \_\_\_\_\_ ) + 2009 ( \_\_\_\_\_ ) + 2010 ( \_\_\_\_\_ ) = **Total (B-5)** a. \_\_\_\_\_
- TAXABLE INCOME AFTER PRIOR YEAR LOSSES (subtract B-5 from B-4) ..... Total (B-6) \_\_\_\_\_**

(Note: Enter "0" if Total B-5 is Greater than Total B-4. The loss will be entered in the system and is available for up to 5 years to offset similar income.)

- PLEASE RETURN TO LINE-BY-LINE INSTRUCTIONS AFTER COMPLETING WORKSHEET B

**WORKSHEET C - CALCULATION OF CREDIT FOR TAXES PAID TO OTHER CITIES ON NON W-2 INCOME**

	COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4
	NAME OF CITY	TAXABLE INCOME (ATTACH LOCAL RETURN)	LOCAL TAXES PAID TO ANOTHER CITY AS SHOWN ON RETURN	CREDIT FOR TAXES PAID TO ANOTHER CITY (COLUMN 2 X 1%)
A.				
B.				
SUBTOTAL				
C. MULTIPLY THE SUBTOTAL IN COLUMN 4 BY THE PERCENTAGE ON WORKSHEET B, LINE 1d			<b>TOTAL (C)</b>	

- PLEASE RETURN TO LINE-BY-LINE INSTRUCTIONS AFTER COMPLETING WORKSHEET C

PAGE 1, LINE 9B