



2008 - MASON INCOME TAX RETURN - 2008

FILE ON OR BEFORE APRIL 15, 2009 – FILING REQUIRED EVEN IF NO TAX IS DUE.

LATE FILING AND/OR LATE PAYMENT OF TAX DUE SUBJECTS YOU TO A MINIMUM \$20.00 PENALTY
90% OF THE TAX MUST BE PAID BY JANUARY 31, 2009 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**

TAXPAYER'S NAME AND ADDRESS _____

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

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 0.008 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 2009

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 0.009 \$ _____
 - 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, 2010 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 2009) 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 will be mailed in July, October and January.
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.

ATTACH W-2'S HERE

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

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: _____

WORKSHEET A SALARIES, WAGES, TIPS AND OTHER EMPLOYEE COMPENSATION PER W-2(S)

	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 .008)
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
- 2008 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 2003 (_____) + 2004 (_____) + 2005 (_____) + 2006 (_____) + 2007 (_____) = **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 .008)
A.				
B.				
SUBTOTAL				

C. MULTIPLY THE SUBTOTAL IN COLUMN 4 BY THE PERCENTAGE ON WORKSHEET B, LINE 1d **TOTAL (C)**

PAGE 1, LINE 9B

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