Instructions for Filling out your 2017 Individual Income Tax Return

- On the front of the return fill in all applicable boxes at the top. This will help us keep your account up to date and prevent long delays in contacting you if there is an issue with your return. If you are under 18 you are not required to file. Please mark Under 18 and send in proof of age. If you turned 18 during the tax year you are responsible for taxes the part of the year you were 18 years of age. Mark any wages earned prior to your birthday.

- If you are retired/disabled and are only collecting Social Security and/or monies from a pension and have no other income including but not limited to gambling winnings, rental income etc. Please mark Box 1 on the front as Only SSA/Pension –Retired/Disabled as applicable then sign at the bottom make your copy for yourself if you keep one and send it in. Do not be late with your return as late filing penalties can still apply.

- All others please flip over to the back of the return. If you have W2s please use <u>Worksheet A.</u> If you have Rental, Business, K-1 Partnership, 1099M, W-2 G or Losses/ 2106 Expense please use **Worksheet B and Schedule Y** as applicable. **<u>ATTACH COPIES OF ANY FORM YOU HAVE WAGES/INCOME ON failure to do so will result in delays and possible rejection of your tax return.</u>**

- Carry your results around to the Front of the page to <u>Line 1</u> if you used <u>Worksheet A</u> and **Line 2** if you used **Worksheet B (*after multiplying the Worksheet B result with the Schedule Y result if used.)***

- Follow the instructions on the front of the return to calculate your income and taxes due. Multiplying Line 3 by .0175 or 1.75% will give you the result for line 4.

- Any estimated payments that we have received and have entered are on line 5. If there is a discrepancy feel free to call and we can go over what credits have been entered. Credits **postmarked** after 1/15/18 will still have a late payment of estimate penalty applied and this will be calculated by the tax department when your return has been entered into the system.

- Line 6 comes from the bottom cell in the second to last column of Worksheet A.

- Line 8 comes from the bottom cell in the last column of Worksheet A.

- Line 9 is lines 5 through 8 added together.

- To determine if you fill out 10-12 or 13-14, determine if line 9 is greater than line 4. If so, Subtract line 4 from line 9 and fill out 10-12. If line 4 is greater than line 9, subtract line 9 from line 4 and fill out line 13. Line 14 will be filled out by the tax department with any applicable penalties and interest.

- Line 15 should equal line 3 to meet "safe harbor" requirements. Line 16 will equal line 4. Line 17 should be lines 6 plus line 8. Line 18 is line 11. Line 19 is line 16 minus lines 17 and 18. Line 20 is line 19 multiplied by .25 or 25%.

- Line 21 is line 13 plus line 14 plus Line 20. This amount needs paid with this return and then continuing estimated payments adding up the line 19 due by 1/15/19.

- Sign and attach all Federal Schedules used in the calculation of this return as well as the first page of your federal 1040. Send this return in by 4/17/18 to avoid any penalty and interest charges. This is a brief overview of how to fill out these new returns. If you have any questions contact me by phone or email. awillis@fairfaxoh.org or 513-527-6506 M-F 8:30-5pm.

BE SURE TO FILE YOUR TAXES BY TUESDAY, APRIL 17,2018.

ATTACH ALL FEDERAL INCOME STATEMENTS (W2S,1099M, 2106, SCHEDULES C,E,F, K-1) AND A COPY OF THE FIRST PAGE OF YOUR FEDERAL 1040.

SIGN YOUR RETURN!

CONTACT WITH QUESTIONS

M-F 8:30-5PM

APPOINTMENTS AVAILABLE UPON REQUEST FROM 5PM-7PM M-F.

WE PREPARE YOUR LOCAL TAXES FOR FAIRFAX FOR FREE.

513-527-6506

AWILLIS@FAIRFAXOH.ORG