

Whitehall Income Tax Division
360 S Yearling Rd
Whitehall OH 43213-1894
(614) 237-9803 Fax (614) 237-7902
Website: www.whitehall-oh.us

2014 INDIVIDUAL W-1040
WHITEHALL CITY INCOME TAX RETURN

DUE ON OR BEFORE: APRIL 15, 2015
FILING REQUIRED EVEN IF NO TAX DUE

FOR OFFICE USE ONLY

DATE REC'D		INITIALS
PMT \$ W/FORM	CHECK #	
CASH CK MO CHG FAX MAIL OFC CDB U/DR		
DATE	INIT.	BATCH #

PROVIDE NAME AND CURRENT ADDRESS:

(LIST BOTH NAMES AND SOCIAL SECURITY NUMBER IF FILING JOINTLY)

Account Number

Name

Spouse

Address

City/State/Zip

Email

SOCIAL SECURITY #

SPOUSE SOCIAL SECURITY #

Resident ☐ Date moved in _____
Non Resident ☐ Date moved out _____
Sole Proprietor ☐
Provide Old Address: _____
City of Residence _____
City of Employment _____

**TO PAY BY CREDIT CARD
ONLINE OR BY PHONE**



www.whitehall-oh.us/tax/htm
(877) 360-3472

Paymentus, the service provider, charges a nominal fee for this service

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

****W-2S, 1099S, FEDERAL SCHEDULES OF INCOME, PG. 1 OF 1040 MUST BE ATTACHED TO BACK OF FORM.**

1. Total W-2 wages. For multiple W-2s, complete worksheet A on reverse. 1 \$ _____
2. 2106 Expenses. Complete worksheet A on reverse. See instructions. 2 \$ _____
3. TAXABLE WAGES. SUBTRACT LINE 2 FROM LINE 1 3 \$ _____
4. Other income. From schedule C, E or O on reverse 4 \$ _____
5. TOTAL INCOME. ADD LINES 3 AND 4 5 \$ _____
6. Adjustments. From schedule X on reverse 6 \$ _____
7. WHITEHALL TAXABLE INCOME. SUBTRACT LINE 6 FROM LINE 5 7 \$ _____

TAX

8. WHITEHALL INCOME TAX. MULTIPLY LINE 7 BY 2.5% 8 \$ _____

**TAX
WITHHELD,
PAYMENTS
AND
CREDITS**

*****CREDITS MUST BE SUBSTANTIATED WITH W-2S OR OTHER CITY RETURNS.**

9. Whitehall income tax withheld. From W-2 and worksheet A on reverse 9 \$ _____
10. Prior year credits 10 \$ _____
11. Estimated payments 11 \$ _____
12. Credit for taxes withheld to other cities (limit 2.5%). See instructions 12 \$ _____
13. Credit for taxes paid to other cities (limit 2.5%). See instructions. 13 \$ _____
14. TOTAL PAYMENTS AND CREDITS. ADD LINES 9 THROUGH 13 14 \$ _____

**BALANCE
DUE,
REFUND
OR
CREDIT**

15. **BALANCE DUE.** If line 8 is more than 14, enter balance due here 15 \$ _____
PENALTY/INTEREST (see instructions): pymt. pen.
16. A. Late filing penalty (\$25) _____ B. Late payment penalty (10% of line 15) \$ _____ C. '14 Decl. (\$10) _____ 16 \$ _____
17. Interest: '14 F (____%) \$ _____; '14 Est. Pmts (____%) \$ _____ 17 \$ _____
18. Total due. Carry to line 28 below (No balance due if less than \$5.00) 18 \$ _____
19. **OVERPAYMENT.** (line 8 less line 14; if \$5.00 or more, show distribution below) 19 \$ _____
20. AMOUNT FROM LINE 19 TO BE REFUNDED 20 \$ _____
21. AMOUNT FROM LINE 19 TO BE CREDITED TO NEXT YEAR 21 \$ _____

**ESTIMATE
FOR 2015**

**DUE 4-15-2015
NO EXTENSION
ALLOWED**

IF YOUR TOTAL INCOME IS SUBJECT TO 100% WITHHOLDING OF WHITEHALL TAX, NO ESTIMATE REQUIRED.

22. Total income subject to tax \$ _____ Multiply by tax rate of 2.5% (.025) 22 \$ _____
23. Subtract any estimated income tax to be withheld or paid to other cities 23 \$ _____
24. Balance of city income tax declared. Subtract line 23 from line 22 24 \$ _____
25. Tax due before credits. Enter at least 22.5% of line 24. 25 \$ _____
26. Less credits. Enter line 21 from above 26 \$ _____
27. Penalty (\$10): \$ _____ Interest (1.5% x mos. Late=) \$ _____ TOTAL PEN/INT 27 \$ _____
28. Net estimated tax due. Subtract line 26 from line 25 and add line 27* 28 \$ _____

TAX DUE

29. Enter balance due from line 18 above (No tax due if less than \$5.00) 29 \$ _____
30. TOTAL TAX DUE. ADD LINES 28 & 29. MAKE CHECKS PAYABLE TO CITY OF WHITEHALL 30 \$ _____

*First Quarter Estimate should be paid with this return. Use enclosed voucher forms to make 2nd, 3rd and 4th quarter payments.

☐ If this return was prepared by a tax practitioner, check here if we may contact him/her directly with questions regarding the preparation of this return.

I DECLARE THAT I HAVE EXAMINED THIS RETURN INCLUDING ACCOMPANYING W-2S, SCHEDULES AND STATEMENTS AND TO THE BEST OF MY KNOWLEDGE AND BELIEF, IT IS TRUE, CORRECT AND COMPLETE.

SIGNATURE OF PREPARER, IF OTHER THAN TAXPAYER

DATE

SIGNATURE OF TAXPAYER

DATE

NAME AND ADDRESS OF PREPARER

TELEPHONE NUMBER

SIGNATURE OF SPOUSE (IF JOINT RETURN)

TELEPHONE NUMBER

WORKSHEET A

SALARIES, WAGES, TIPS AND OTHER EMPLOYEE COMPENSATION

COLUMN 1	COLUMN 2	COLUMN 3	COLUMN 4	COLUMN 5
CITY WHERE EMPLOYED	INCOME FROM EACH LOCAL W-2	*2106 EXPENSES, IF ANY	WHITEHALL TAX WITHHELD	*OTHER CITY TAX WITHHELD
A.				
B.				
C.				
D.				
E. TOTALS				

ENTER ON:

PAGE 1 LINE 1

PAGE 1 LINE 2

PAGE 1 LINE 9

PAGE 1 LINE 12

*Income reduced by 2106 and earned in another city must also reduce the tax withheld for that city by the same percentage.

1. SCHEDULE C – SELF EMPLOYMENT INCOME (Must report net profit and/or loss) (Attach Federal Schedule C)

Business Name _____ Business Address _____
 Kind of Business _____ Date Started _____ Date Ended _____

A. Net Profit or Loss (Attach copy of Fed. Sch. C (Pages 1&2). A Whitehall resident claiming credit for tax paid to another city on this income must include a copy of the other tax return to take credit against Whitehall tax.) \$ _____
 B. Percentage Amount Allowable to the Municipality (Attach allocation calculation) \$ _____
 C. **Amount subject to tax. Multiply A times B.** **Total (1)** \$ _____

The net loss from an unincorporated business activity may not be used to offset salaries, wages, commissions or other compensation. However, if a taxpayer is engaged in two or more taxable business activities to be included on the same return, the net loss of one unincorporated business activity (except any portion of a loss separately reportable for municipal tax purposes to another taxing entity) may be used to offset the profits of another for purposes of arriving at overall net profits.

2. SCHEDULE E - INCOME FROM RENTS [Attach Federal Schedule E(s)]

KIND AND EXACT LOCATION OF PROPERTY (LOSSES WITHOUT EXACT LOCATION WILL BE DISALLOWED)	NET PROFIT OR (LOSS)	KIND AND EXACT LOCATION OF PROPERTY (LOSSES WITHOUT EXACT LOCATION WILL BE DISALLOWED)	NET PROFIT OR (LOSS)
TENANT NAME _____ ADDRESS _____ CITY, STATE, ZIP _____		TENANT NAME _____ ADDRESS _____ CITY, STATE, ZIP _____	
TENANT NAME _____ ADDRESS _____ CITY, STATE, ZIP _____		TENANT NAME _____ ADDRESS _____ CITY, STATE, ZIP _____	

Please see unincorporated business activity in instructions. List on a separate sheet if more than 4 properties

3. SCHEDULE 0 - OTHER INCOME NOT INCLUDED IN SCHEDULES C OR E (SUBSTANTIATION MUST BE ATTACHED)

INCOME FROM PARTNERSHIPS, ESTATES, TRUSTS, FEES, TIPS, LOTTERY, PRIZES, ETC. (attach copies of all applicable schedules, including K-1's; as well as copies of other city returns to substantiate credit against tax due Whitehall on the same income.

MISCELLANEOUS INCOME received such as lottery/gambling winnings, tips (Not already included in wages) prizes and cash awards resulting from work-related activities, fees (such as director's, union steward, executive), non-compete income, etc. Commissions, 1099-Misc, Sub-contract income, etc., that is not reported on Fed. Sch. C

RECEIVED FROM NAME/I.D. NUMBER	FOR DESCRIPTION AND/OR LOCATION (APPLICABLE LOSSES W/O EXACT LOCATIONS WILL BE DISALLOWED)	AMOUNT
A.		
B.		

Total (3) \$ _____

TOTAL OTHER INCOME (Add sections 1-3) \$ _____

Enter on Page 1, section 4

SCHEDULE X - ADJUSTMENT TO INCOME (Part year residents and income no: subject to tax)

Part year residents (Wages earned in Whitehall may not be prorated). To prorated income – take total income divided by 12 x # of months not a resident of Whitehall or actual earnings with documentation. Enter Column 1

Under 18 for all or part of the year, enter income earned prior to turning 18 and attach proof of age. Birth date: ____/____/____

Employment dates: ____/____/____ to ____/____/____ ; if you have multiple W2's attach list of dates employed for each W2 including month, day & year.

COLUMN 1

EXPLANATION	DEDUCTIONS
Total adjustment	

ENTER ON PAGE 1 LINE 6

MAKE CHECK OR MONEY ORDER TO:

CITY OF WHITEHALL,
INCOME TAX DIVISION
360 SOUTH YEARLING ROAD
WHITEHALL, OHIO 43213-1894
(614) 237-9803, FAX (614) 237-7902

CITY OF WHITEHALL, OHIO
QUARTERLY NOTICE OF INSTALLMENT
DUE ON ESTIMATED TAX DECLARED

PAID CHECK WILL BE YOUR RECEIPT – DO NOT REMIT CASH BY MAIL

VOUCHER 4

INDIVIDUALS - DUE JANUARY 31
OTHERS - DUE 15TH DAY
OF 12TH MONTH

NAME(S) AND ADDRESS:

Account Number

Name

Spouse

Address

City/State/Zip

Email

SOCIAL SECURITY NUMBER OR FEDERAL TAX I.D. NUMBER:

TOTAL ESTIMATED
TAX DECLARED:

\$

QUARTERLY PAYMENT
ENCLOSED:

\$

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Q-1 NOTIFY INCOME TAX DIVISION PROMPTLY OF ANY CHANGE IN OWNERSHIP OR NAME AND ADDRESS SHOWN ABOVE.

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INCOME TAX DIVISION
360 SOUTH YEARLING ROAD
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VOUCHER 3

INDIVIDUALS - DUE OCTOBER 31
OTHERS - DUE 15TH DAY OF
THE 9TH MONTH

NAME(S) AND ADDRESS:

Account Number

Name

Spouse

Address

City/State/Zip

Email

SOCIAL SECURITY NUMBER OR FEDERAL TAX I.D. NUMBER:

TOTAL ESTIMATED
TAX DECLARED:

\$

QUARTERLY PAYMENT
ENCLOSED:

\$

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QUARTERLY NOTICE OF INSTALLMENT
DUE ON ESTIMATED TAX DECLARED

PAID CHECK WILL BE YOUR RECEIPT – DO NOT REMIT CASH BY MAIL

VOUCHER 2

INDIVIDUALS - DUE JULY 31
OTHERS - DUE 15TH DAY OF
THE 6TH MONTH

NAME(S) AND ADDRESS:

Account Number

Name

Spouse

Address

City/State/Zip

Email

SOCIAL SECURITY NUMBER OR FEDERAL TAX I.D. NUMBER:

TOTAL ESTIMATED
TAX DECLARED:

\$

QUARTERLY PAYMENT
ENCLOSED:

\$

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