

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

# 2015 INDIVIDUAL W-1040 WHITEHALL CITY INCOME TAX RETURN

**DUE ON OR BEFORE: APRIL 18, 2016**  
**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. '15 Decl. (\$10) \_\_\_\_\_ 16 \$ \_\_\_\_\_
17. Interest: '15 F ( \_\_\_\_\_ %) \$ \_\_\_\_\_; '15 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 \$ \_\_\_\_\_

### DECLARATION OF ESTIMATED TAX FOR 2016 DUE APRIL 18, 2016

### VOUCHER 1

### ESTIMATE FOR 2016

\*\*\*

**DUE 4-18-2016  
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 25% of line 24 ..... 25 \$ \_\_\_\_\_
26. Less credits. Enter line 21 from above ..... 26 \$ \_\_\_\_\_
27. Penalty (15%): \$ \_\_\_\_\_ Interest (.42% 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

ATTACH W-2'S HERE

# 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. <b>TOTALS</b>				

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