

CITY OF NEW LEXINGTON
 Income Tax Bureau
 125 S. Main St.
 New Lexington, OH 43764
 (740) 342-4660
 Hours 8:00AM - 4:00PM Monday - Friday

**INCOME TAX RETURN
 FOR TAX YEAR: _____**

**PER SECTION 77-9 OF
 NEW LEXINGTON ORDINANCE,
 A RETURN MUST BE FILED
 IF A TAX IS DUE OR NOT.**

**This return is for both Business &
 Individual. See instructions on the
 back of this form.**

Calendar year taxpayers file
 on or before **April 15**.

Fiscal & partial year taxpayers file
 within 105 days from end of period.

Number in household
 living within corporation

If tax forms are no longer needed,
 check box and state reason:

If address is not correct, please make necessary changes.

1. **Wages, Salaries, tips and other earned compensation. Use highest amount on W-2. See line 4 of instructions. Attach all W-2's. If you lived here a partial year, please come to the tax office.** \$ _____
2. **Taxable income from business or rental. Attach copy of applicable Federal schedule.**..... \$ _____
3. **Total line 1 & 2. Business loss cannot be subtracted from line 1.** \$ _____
4. **1% of line 3 - Tax Due** \$ _____
5. **Credits:**
 - A. Amount of New Lexington tax withheld by employer \$ _____
 - B. Tax paid to other municipalities (up to 1% per W-2) x 0.5 \$ _____
 - C. Total Credit: Add lines 5A and 5B \$ _____
6. **Subtract line 5C from line 4** \$ _____
7. **Payments and credits applied toward tax year.** \$ _____
8. **Amount DUE or OVERPAYMENT: Subtract line 7 from line 6. PAYMENT IN FULL MUST ACCOMPANY RETURN.**
 - A. **1.5% penalty on tax due for late filing per month** \$ _____
 - B. **0.5% interest on tax due for late filing per month** \$ _____
 - C. Total amount due \$ _____
9. **Distribution of overpayment:**
 - A. Credit to next year \$ _____
 - B. Refund \$ _____

No refund will be made until 1st quarter estimate is paid.

NOTE: If the balance due is less than \$1.00, payment need not be made. If the overpayment is less than \$1.00, no refund will be issued.

NOTE: Mailing income tax returns without payment, proper documentation, and/or signature does not constitute a filing. Incomplete returns will not be processed and the same will be returned to you.

Declaration of Estimated New Lexington Income Tax

Per Ordinance 77-9 **YOU MUST DECLARE** an estimated tax if you owe more than \$50.00. Declaration needs to be filed on all non-taxed wages. First quarter payment is due with return. Estimates not paid by the due date will be assessed penalties and interest.

10. Total income subject to tax (not withheld from) \$ _____ multiply by 1% \$ _____
11. Credits from previous tax year from line 9A above \$ _____
12. Remaining balance - subtract line 11 from line 10 \$ _____
13. **Amount due with filing of return (25% of line 12)** \$ _____
14. Total tax due - Add line 8C and line 13 above (Both are due by **April 15**) \$ _____

NOTE: 25% of declaration payment is due April 15. Next billing due dates: July 31, October 31 and January 31.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct and complete. Declaration of preparer (other than taxpayer) is based on all information of which preparer has any knowledge.

SIGNATURE OF TAXPAYER _____ DATE _____ PHONE NO. TO CONTACT _____ SIGNATURE OF PREPARER _____ DATE _____

SIGNATURE OF TAXPAYER _____ DATE _____

Without signatures return is incomplete. Original to be filed with tax office.

PLEASE TURN TO BACKSIDE FOR INSTRUCTIONS

INSTRUCTIONS

PER SECTION 77-9 OF NEW LEXINGTON ORDINANCE, A RETURN MUST BE FILED IF A TAX IS DUE OR NOT.

1. Fill in the tax year for which you are filing this return.
2. If you had no earned income for the entire tax year, put a zero on line 1, **sign form** and return to the income tax office.
3. If you have moved from New Lexington or no longer work in New Lexington, check box in upper right corner of form and state reason why forms are no longer needed.
4. You must send all copies of W-2's, 1099's or Federal schedules for all money claimed with the original copy of the tax return. Payment must be made at the time of filing. Return must be signed. If any of these items are omitted your income tax return **WILL BE RETURNED TO YOU FOR COMPLETION**.
5. Extensions requests must be received by the due date or they will not be approved.
6. The income listed below is EXEMPT from New Lexington tax:
 - A. Military pay, including reserve pay
 - B. Alimony
 - C. Capital gains
 - D. Interest
 - E. Dividends
 - F. Social Security benefits
 - G. Workers' Compensation
 - H. State unemployment benefits
 - I. Insurance benefits
 - J. Prizes - unless connected with employment
 - K. Gambling winnings (losses are NOT deductible)
 - L. Income of religious, fraternal, charitable, literary or educational institutions
 - M. Public assistance payments
 - N. Pension income - includes lump sum distributions
 - O. Annuities - at time of distribution
 - P. Housing for clergy
 - Q. Government allotments
 - R. Election Board payment up to \$1,000.00
 - S. IRC Section 125 cafeteria plans
7. You will receive quarterly billing for declaration of estimated tax due.
8. 1st quarter estimate is due at the same time as your final return. **If not paid, penalties and interest will be assessed after April 15.**
9. Amount on line 7 of tax return (if applicable) may not reflect late 4th quarter payments.
10. Business profit is taxable on net profit.
11. Rental income is taxable on net profit.
12. To benefit us on applying for Federal Grant Money, please fill in the number in household box in upper right corner.