

Do not use staples.



Department of
Taxation



13000106

Taxable year beginning in

2013

IT 1040 Rev. 11/13
**Individual
Income Tax Return**

Use only black ink.

Taxpayer Social Security no. (required) ▶▶ If deceased ☐ check box Spouse's Social Security no. (only if joint return) ▶▶ If deceased ☐ check box

Enter school district # for
this return (see pages 43-48).

SD# ▶▶

Use UPPERCASE letters.

Your first name

M.I.

Last name

Spouse's first name (only if married filing jointly)

M.I.

Last name

Mailing address (for faster processing, use a street address)

City

State

ZIP code

Ohio county (first four letters)

Home address (if different from mailing address) – do **NOT** show city or state

ZIP code

County (first four letters)

Foreign country (provide this information if the mailing address is outside the U.S.)

Foreign postal code

E-mail address

Ohio Residency Status – Check applicable box

☐ Full-year
resident

☐ Part-year
resident

☐ Nonresident
Indicate state ▶▶

Check applicable box for spouse (only if married filing jointly)

☐ Full-year
resident

☐ Part-year
resident

☐ Nonresident
Indicate state ▶▶

Filing Status – Check one (as reported on federal income tax return,
with limited exceptions – see instructions on page 14)

☐ Single, head of household or qualifying widow(er)

☐ Married filing jointly

☐ Married filing separately
(enter spouse's SS#) ▶▶

☐ Required to file Schedule IT S (see instructions on page 9)

Ohio Political Party Fund

Yes

No

Do you want \$1 to go to this fund?

☐

☐

If joint return, does your spouse want \$1 to go to this fund?

☐

☐

Note: Checking "Yes" will not increase your tax or decrease your refund.

**Do not use staples, tape or glue. Place your W-2(s), check
(payable to Ohio Treasurer of State) and Ohio form
IT 40P after the last page of your return. Include forms W-2G
and 1099-R if tax was withheld. Place any other supporting
documents or statements after the last page of your return.**

Go paperless. It's FREE!
Visit tax.ohio.gov to try Ohio I-File.

**Most electronic filers receive their refunds
in 5-7 business days by direct deposit!**

INCOME AND TAX INFORMATION – If amount is negative, type a negative sign ("–") before the figure.

- | | | | | | |
|---|-----|----------------------|----------------------|---|---|
| 1. Federal adjusted gross income (from IRS form 1040, line 37; 1040A, line 21;
1040EZ, line 4; 1040NR, line 36; 1040NR-EZ, line 10; or Ohio form IT S, line 31) | 1. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 2. Adjustments from line 50 on page 3 of Ohio form IT 1040 (enclose page 3) | 2. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 3. Ohio adjusted gross income (line 2 added to or subtracted from line 1) | 3. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 4. Personal exemption and dependent exemption deduction – multiply your personal
and dependent exemptions _____ times \$1,700 and enter the result here | 4. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 5. Ohio taxable income (line 3 minus line 4; enter -0- if line 3 is less than line 4) | 5. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 6. Tax on line 5 (see tax tables on pages 35-41 of the instructions) | 6. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 7. Schedule B credits from line 59 on page 4 of Ohio form IT 1040 (enclose page 4) | 7. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 8. Ohio tax less Schedule B credits (line 6 minus line 7; enter -0- if line 6 is less than line 7) | 8. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 9. Income-based exemption credit (see instructions on page 19) | 9. | <input type="text"/> | <input type="text"/> | 0 | 0 |
| 10. Ohio tax less exemption credit (line 8 minus line 9; enter -0- if line 8 is less than line 9) | 10. | <input type="text"/> | <input type="text"/> | 0 | 0 |

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Ohio

Department of
Taxation

13000206

Taxable year beginning in

2013

IT 1040 Rev. 11/13
Individual
Income Tax ReturnSS#

10a. Amount from line 10 on page 1	10a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
11. Joint filing credit. See the instructions on page 19 for eligibility and documentation requirements (this credit is for married filing jointly status only). _____ % times line 10a (limit \$650)	11.	<input type="text"/>	<input type="text"/>	<input type="text"/>
12. Ohio income tax less joint filing credit (line 10a minus line 11)	12.	<input type="text"/>	<input type="text"/>	<input type="text"/>
13. Total credits from line 71 on page 4 of Ohio form IT 1040 (enclose page 4)	13.	<input type="text"/>	<input type="text"/>	<input type="text"/>
14. Earned income credit (see the worksheet on page 20 of the instructions)	14.	<input type="text"/>	<input type="text"/>	<input type="text"/>
15. Ohio adoption credit (\$1,500 per child adopted during the year)	15.	<input type="text"/>	<input type="text"/>	<input type="text"/>
16. Manufacturing equipment grant. You must include the grant request form	16.	<input type="text"/>	<input type="text"/>	<input type="text"/>
17. Ohio income tax (line 12 minus lines 13, 14, 15 and 16; enter -0- if the total of lines 13, 14, 15 and 16 is more than line 12)	17.	<input type="text"/>	<input type="text"/>	<input type="text"/>
18. Interest penalty on underpayment of estimated tax. Enclose Ohio form IT/SD 2210 (see page 21 of the instructions)	18.	<input type="text"/>	<input type="text"/>	<input type="text"/>
19. Unpaid Ohio use tax (see the worksheet on page 33 of the instructions)	19.	<input type="text"/>	<input type="text"/>	<input type="text"/>
20. Total Ohio tax liability (add lines 17, 18 and 19)	TOTAL TAX ▶ 20.	<input type="text"/>	<input type="text"/>	<input type="text"/>
21. Ohio income tax withheld (box 17 on W-2; box 15 on W-2G; and box 12 on 1099-R). Place W-2(s), W-2G(s) and 1099-R(s) after the last page of this return	AMOUNT WITHHELD ▶ 21.	<input type="text"/>	<input type="text"/>	<input type="text"/>
22. Add the 2013 Ohio form IT 1040ES payment(s), 2013 Ohio form IT 40P extension payment(s) and 2012 overpayment credited to 2013	22.	<input type="text"/>	<input type="text"/>	<input type="text"/>
23. Refundable credits from line 73 on page 4 of Ohio form IT 1040 (enclose page 4)	23.	<input type="text"/>	<input type="text"/>	<input type="text"/>
24. Add lines 21, 22 and 23	TOTAL PAYMENTS ▶ 24.	<input type="text"/>	<input type="text"/>	<input type="text"/>
If line 24 is MORE THAN line 20, go to line 25. If line 24 is LESS THAN line 20, skip to line 29.				
25. If line 24 is MORE THAN line 20, subtract line 20 from line 24	AMOUNT OVERPAID ▶ 25.	<input type="text"/>	<input type="text"/>	<input type="text"/>
26. Amount of line 25 to be credited to 2014 income tax liability	CREDIT TO 2014 ▶ 26.	<input type="text"/>	<input type="text"/>	<input type="text"/>
27. Amount of line 25 that you wish to <u>donate</u> to the following fund(s):				
a. Military injury relief		<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Natural areas		<input type="text"/>	<input type="text"/>	<input type="text"/>
c. Ohio Historical Society		<input type="text"/>	<input type="text"/>	<input type="text"/>
d. Wildlife species		<input type="text"/>	<input type="text"/>	<input type="text"/>
28. Line 25 minus the sum of lines 26 and 27a, b, c and d. Enter here, then skip to line 30	28.	<input type="text"/>	<input type="text"/>	<input type="text"/>
29. If line 24 is LESS THAN line 20, subtract line 24 from line 20	AMOUNT DUE ▶ 29.	<input type="text"/>	<input type="text"/>	<input type="text"/>
30. Interest and penalty due on late-paid tax and/or late-filed return (see page 21 of the instructions)	INTEREST AND PENALTY ▶ 30.	<input type="text"/>	<input type="text"/>	<input type="text"/>
If you entered an amount on line 28, skip to line 32. If you entered an amount on line 29, go to line 31.				
31. Amount due plus interest and penalty (add lines 29 and 30). If payment is enclosed, make check payable to Ohio Treasurer of State and include Ohio form IT 40P (see our Web site at tax.ohio.gov)	AMOUNT DUE PLUS INTEREST AND PENALTY ▶ 31.	<input type="text"/>	<input type="text"/>	<input type="text"/>
32. Refund less interest and penalty (line 28 minus line 30). Enter the amount here. (If line 30 is more than line 28, you have an amount due. Subtract line 28 from line 30 and enter this amount on line 31.)	YOUR REFUND ▶ 32.	<input type="text"/>	<input type="text"/>	<input type="text"/>

SIGN HERE (required): I have read this return. Under penalties of perjury, I declare that, to the best of my knowledge and belief, the return and all enclosures are true, correct and complete.

If your refund is \$1.00 or less, no refund will be issued.
If you owe \$1.00 or less, no payment is necessary.

▶ Your signature _____ Date (MM/DD/YYYY)

▶ Spouse's signature (see page 10 of the instructions) _____ Phone number (optional)

Preparer's printed name (see page 10 of the instructions) _____ Phone number

Do you authorize your preparer to contact us regarding this return? ☐ Yes ☐ No

For Department Use Only

Code

MAILING INFORMATION

NO Payment Enclosed – Mail to:
Ohio Department of Taxation
P.O. Box 2679
Columbus, OH 43218-2679

**Enclose your federal income
tax return if line 1 on page 1 of this
return is -0- or negative.**

Payment Enclosed – Mail to:
Ohio Department of Taxation
P.O. Box 2057
Columbus, OH 43218-2057

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2013 IT 1040

If line 2 (on page 1) is -0- or blank, do not mail page 3.

	Department of Taxation		Taxable year beginning in	IT 1040 Rev. 11/13 Individual Income Tax Return
			2013	
SS# <input type="text"/>	<input type="text"/>	<input type="text"/>	13000306	

SCHEDULE A – Income Adjustments (Additions and Deductions)

Additions (add income items only to the extent not included on page 1, line 1).

33. Non-Ohio state or local government interest and dividends	33.	<input type="text"/>	<input type="text"/>	<input type="text"/>
34. Certain Ohio pass-through entity and financial institutions taxes paid and Ohio Revised Code section 5733.40(A) pass-through entity adjustment	34.	<input type="text"/>	<input type="text"/>	<input type="text"/>
35a. Federal interest and dividends subject to state taxation	35a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Reimbursement of college tuition expenses and fees deducted in any previous year(s) and noneducation expenditures from a college savings account	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
c. Losses from sale or disposition of Ohio public obligations	c.	<input type="text"/>	<input type="text"/>	<input type="text"/>
d. Nonmedical withdrawals from a medical savings account	d.	<input type="text"/>	<input type="text"/>	<input type="text"/>
e. Reimbursement of expenses previously deducted for Ohio income tax purposes, but only if the reimbursement is not in federal adjusted gross income	e.	<input type="text"/>	<input type="text"/>	<input type="text"/>
f. Lump sum distribution add-back and miscellaneous federal income tax adjustments	f.	<input type="text"/>	<input type="text"/>	<input type="text"/>
g. Adjustment for Internal Revenue Code sections 168(k) and 179 depreciation expense	g.	<input type="text"/>	<input type="text"/>	<input type="text"/>
36. Total additions (add lines 33 through 35g and enter here). You must complete the applicable line items above	36.	<input type="text"/>	<input type="text"/>	<input type="text"/>

Deductions (deduct income items only to the extent included on page 1, line 1).

37a. Federal interest and dividends exempt from state taxation	37a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Adjustment for Internal Revenue Code sections 168(k) and 179 depreciation expense	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
38. Employee compensation earned in Ohio by full-year residents of neighboring states and certain income earned by military nonresidents and civilian nonresident spouses	38.	<input type="text"/>	<input type="text"/>	<input type="text"/>
39a. Military pay for Ohio residents, but only if the military pay is included on line 1 of this return and is received while the military member was stationed outside Ohio	39a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Uniformed services retirement income and military injury relief fund amounts included in federal adjusted gross income (line 1 on page 1)	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
40a. State or municipal income tax overpayments shown on IRS form 1040, line 10	40a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Refund or reimbursements shown on IRS form 1040, line 21 for itemized deductions claimed on a prior year federal income tax return	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
c. Repayment of income reported in a prior year and miscellaneous federal tax adjustments	c.	<input type="text"/>	<input type="text"/>	<input type="text"/>
41. Small business investor income deduction	41.	<input type="text"/>	<input type="text"/>	<input type="text"/>
42. Disability and survivorship benefits (do not include pension continuation benefits)	42.	<input type="text"/>	<input type="text"/>	<input type="text"/>
43. Qualifying Social Security benefits and certain railroad retirement benefits	43.	<input type="text"/>	<input type="text"/>	<input type="text"/>
44a. Education: Ohio 529 contributions; tuition credit purchases	44a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Pell/Ohio College Opportunity taxable grant amounts used to pay room and board	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
45. Certain Ohio National Guard reimbursements and benefits	45.	<input type="text"/>	<input type="text"/>	<input type="text"/>
46a. Unreimbursed long-term care insurance premiums, unsubsidized health care insurance premiums and excess health care expenses (see worksheet on page 27 of the instructions) ..	46a.	<input type="text"/>	<input type="text"/>	<input type="text"/>
b. Funds deposited into, and earnings of, a medical savings account for eligible health care expenses (see worksheet on page 23 of the instructions)	b.	<input type="text"/>	<input type="text"/>	<input type="text"/>
c. Qualified organ donor expenses (maximum \$10,000 per taxpayer) and amounts contributed to an individual development account	c.	<input type="text"/>	<input type="text"/>	<input type="text"/>
47. Wage expense not deducted due to the targeted jobs or the work opportunity tax credits	47.	<input type="text"/>	<input type="text"/>	<input type="text"/>
48. Interest income from Ohio public obligations and from Ohio purchase obligations; gains from the sale or disposition of Ohio public obligations; public service payments received from the state of Ohio or income from a transfer agreement	48.	<input type="text"/>	<input type="text"/>	<input type="text"/>
49. Total deductions (add lines 37a through 48 only). You must complete the applicable line items above	49.	<input type="text"/>	<input type="text"/>	<input type="text"/>
50. Net adjustments – If line 36 is MORE THAN line 49, enter the difference here and on line 2 as a positive amount . If line 36 is LESS THAN line 49, enter the difference here and on line 2 as a negative amount	50.	<input type="text"/>	<input type="text"/>	<input type="text"/>

	Department of Taxation	 13000406	Taxable year beginning in <div style="border: 2px solid green; padding: 5px; font-size: 24pt; font-weight: bold;">2013</div>	<div style="font-size: 24pt; font-weight: bold;">IT 1040</div> Rev. 11/13 Individual Income Tax Return
SS# 				

SCHEDULE B – Nonbusiness Credits

51. Retirement income credit (limit \$200 per return). See the table on page 28 of the instructions	51.	00
52. Senior citizen credit (you must be 65 or older to claim this credit; limit \$50 per return)	52.	00
53. Lump sum distribution credit (you must be 65 or older to claim this credit)	53.	00
54. Child care and dependent care credit (see the worksheet on page 29 of the instructions)	54.	00
55. Lump sum retirement credit	55.	00
56. If line 5 on page 1 is \$10,000 or less, enter \$88; otherwise, enter -0- or leave blank.....	56.	00
57. Displaced worker training credit (see the instructions and worksheet on pages 29 and 30) (limit \$500 per taxpayer).....	57.	00
58. Ohio political contributions credit (limit \$50 per taxpayer)	58.	00
59. Total Schedule B credits (add lines 51 through 58). Enter here and on page 1, line 7	59.	00

SCHEDULE C – Full-Year Ohio Resident Credit

60. Enter the portion of line 3 on page 1 subjected to tax by other states or the District of Columbia while you were an Ohio resident (limits apply – see page 29 of the instructions) .	60.	00
61. Enter Ohio adjusted gross income (line 3 on page 1)	61.	00
62. Divide line 60 by line 61 and enter the result here (four digits; do not round). Multiply this factor by the amount on line 12 and enter the result here.....	62.	00
63. Enter the 2013 income tax, less all credits other than withholding and estimated tax payments and overpayment carryforwards from previous years, paid to other states or the District of Columbia (limits apply – see page 30 of the instructions).....	63.	00
64. Enter the smaller of line 62 or line 63. This is your Ohio resident tax credit. Enter here and on line 69 below. If you filed a return for 2013 with a state(s) other than Ohio, enter the two-letter state abbreviation in the box(es) below	64.	00
<div style="display: flex; justify-content: space-around; margin-top: 10px;"> </div>		

SCHEDULE D – Nonresident / Part-Year Resident Credit (date of part-year residency to)

65. Enter the portion of Ohio adjusted gross income (line 3) that was not earned or received in Ohio. Include Ohio form IT 2023 if required (see page 30 of the instructions).....	65.	00
66. Enter the Ohio adjusted gross income (line 3 on page 1)	66.	00
67. Divide line 65 by line 66 and enter the result here (four digits; do not round). Multiply this factor by the amount on line 12. Enter here and on line 70 below	67.	00

SUMMARY OF CREDITS FROM SCHEDULES C, D AND E

68. Enter the amount from line 10 of Schedule E, Nonrefundable Business Credits (see page 31 of the instructions).....	68.	00
69. Enter the amount from line 64 above	69.	00
70. Enter the amount from line 67 above	70.	00
71. Add lines 68, 69 and 70. Enter here and on page 2, line 13	71.	00

REFUNDABLE CREDITS – INCLUDE CERTIFICATE(S) AND K-1(S)

72a. Business jobs credit	72b. Pass-through entity credit	72c. Historic preservation credit
 00	 00	 00
72d. Motion picture production credit	72e. Financial Institutions Tax (FIT) credit	
 00	 00	
73. Total of lines 72a-e. Enter here and on page 2, line 23.		
 00		