

How to File a Refund Claim for Ohio Pass-Through Entity and Fiduciary Income Taxes IT 1041, IT 4708 and IT 1140

Complete and file forms IT 1041, 4708 or 1140 to request a refund of any excessive or erroneous payment of tax submitted by the taxpayer or qualifying entity. If an original return has already been filed, file the same form type (IT 1041, 4708 or 1140) indicating the form is an amended return using the check box at the top of page one. Include all documentation to support the refund claim, along with contact information in the event additional evidence is needed to substantiate the refund requested. If a return has yet to be filed, an original return should be completed requesting the refund and filed along with the supporting documentation. The IT 1041, 4708 or 1140 forms can be found on our website at tax.ohio.gov/Forms. Any questions can be emailed to the department via our website, or you can call (888) 405-4039.