

**2019 HEATH INDIVIDUAL TAX RETURN**  
**FILING IS REQUIRED WHETHER OR NOT TAX IS DUE AND RECEIVED**  
**IN OUR OFFICE OR POSTMARKED NO LATER THAN APRIL 15TH, 2020**

FOR OFFICE USE ONLY

AMT. REC. \_\_\_\_\_  
DATE REC. \_\_\_\_\_  
CASH \_\_\_\_ CHECK \_\_\_\_ # \_\_\_\_\_  
CAP \_\_\_\_ ISSU. \_\_\_\_ BY. \_\_\_\_\_  
AUD.REQ. Y \_\_\_\_ N \_\_\_\_  
COPY MAILED DATE \_\_\_\_ BY \_\_\_\_\_  
LETTER MAILED DATE \_\_\_\_ BY \_\_\_\_\_

TAXPAYER SOCIAL SECURITY # \_\_\_\_\_

SPOUSE SOCIAL SECURITY # \_\_\_\_\_

PHONE # \_\_\_\_\_

DATE MOVED IN OR OUT OF HEATH  
IN \_\_\_\_\_ OUT \_\_\_\_\_

CORRECT NAME AND ADDRESS ABOVE IF WRONG.

IF ALL INCOME IN 2019 WAS NON-TAXABLE, COMPLETE THIS SECTION (See INFORMATION FILING /Gen. Instruction Page).

- I AM RETIRED AND HAVE NON-TAXABLE INCOME OF  SOCIAL SECURITY/PENSION  INTEREST/DIVIDENDS  
 I HAD NON-TAXABLE INCOME OF  ACTIVE MILITARY PAY  UNEMPLOYMENT  DISABILITY  ADC

NOTE: IF YOU HAD NO OTHER SOURCES OF INCOME IN 2019 - STOP HERE, SIGN, DATE AND MAIL YOUR RETURN.

**SECTION A INCOME**

ATTACH ALL APPROPRIATE W-2'S, FEDERAL 1040, SCHEDULES, EXPLANATIONS ETC.

1. Total W-2 wages. \_\_\_\_\_  
1a. Total Adjustments (Page 2, Line A2) \_\_\_\_\_  
2. **PAGE 2 INCOME SECTION I, LINE 7** \_\_\_\_\_  
2a. **PAGE 2 INCOME SECTION I, LINE 3(a)**. Only if a loss enter here \_\_\_\_\_ \$ \_\_\_\_\_  
3. **INCOME SUBJECT TO HEATH TAX (Line 1 minus line 1a, plus Line 2)** \_\_\_\_\_  
4. **HEATH INCOME TAX - 2.0% OF LINE 3** \_\_\_\_\_

**SECTION B CREDITS**

5. 2019 Estimated tax paid to Heath **DO NOT EXCEED 1.5% CREDIT**  
6. HEATH TAX WITHHELD (W-2 "Local Tax") INCOME \$ \_\_\_\_\_ x 2.0% \_\_\_\_\_  
7. HEATH TAX WITHHELD INCOME \$ \_\_\_\_\_ x .5% \_\_\_\_\_  
8. ALL OTHER CITIES (NOT TO EXCEED 1.5%) INCOME \$ \_\_\_\_\_ x 1.5% \_\_\_\_\_  
INCOME \$ \_\_\_\_\_ x \_\_\_\_\_ % \_\_\_\_\_  
INCOME \$ \_\_\_\_\_ x \_\_\_\_\_ % \_\_\_\_\_  
9. **TOTAL CREDITS (Add Lines 5, 6, 7, 8)** \_\_\_\_\_  
10. If Line 4 is greater than Line 9, enter difference. Balance due \_\_\_\_\_  
11. **LATE FILING.**  
a. Late Filing Charge @ \$25.00 per month (max-\$150.00) (If filed after April 15th, 2020) \_\_\_\_\_  
b. Interest @ .583% per month or fraction thereof on unpaid taxes \_\_\_\_\_  
c. Penalty @ 15% on unpaid taxes \_\_\_\_\_  
d. TOTAL of Line 11a, 11b, and 11c \_\_\_\_\_  
12. TOTAL DUE add lines 10 and 11d. (Payments \$10.00 or less are not required) \_\_\_\_\_  
13. If Line 9 is greater than Line 4 resulting in overpayment, please indicate if you desire Refund \_\_\_\_\_ or credit to 2020 tax \_\_\_\_\_. (Overpayments \$10.00 or less are not refunded nor carried forward) \_\_\_\_\_

**SECTION C DECLARATION OF ESTIMATED TAX FOR 2020**

Required where tax due exceeds \$200.00.

14. Total income subject to tax \_\_\_\_\_ \$ \_\_\_\_\_. Multiply by tax rate of 2% \_\_\_\_\_  
15. Tax withheld by employer (Do not exceed 1.5%) \_\_\_\_\_  
16. 2020 Net tax due (Line 14 less 15) \_\_\_\_\_  
17. A minimum of 22½% of line 16 \_\_\_\_\_  
18. Carryover from prior year. (Line 13, if carryover indicated) \_\_\_\_\_  
19. Subtract Line 18 from Line 17 (Pay this amount. If less than zero, enter zero) \_\_\_\_\_  
20. **Total payment (Add Lines 12 and 19) (Payments \$10.00 or less are not required)** \_\_\_\_\_

TAXPAYER USE OFFICE USE

1		1	
1a		1a	
2		2	
3		3	
4		4	
	<b>TAX CREDITS</b>		<b>TAX CREDITS</b>
5		5	
6		6	
7		7	
8		8	
9		9	
10		10	
11a		11a	
11b		11b	
11c		11c	
11d		11d	
12		12	
13		13	
14		14	
15		15	
16		16	
17		17	
18		18	
19		19	
20		20	

UNDER PENALTY OF PERJURY, THE UNDERSIGNED DECLARES THAT THIS RETURN IS TRUE, CORRECT AND COMPLETE FOR TAX YEAR 2019. MAKE CHECK PAYABLE TO HEATH INCOME TAX BUREAU.

- 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.

Tax Preparer's Signature \_\_\_\_\_ Date \_\_\_\_\_

Your Signature \_\_\_\_\_ Date \_\_\_\_\_

Social Security Number (ID Number) \_\_\_\_\_ Phone \_\_\_\_\_

Spouse Signature \_\_\_\_\_ Phone \_\_\_\_\_

**WORKSHEET A ADJUSTMENTS TO LINE 1 INCOME**

- 1. W-2 income earned Out of City While Not A Resident (attach calculations) ..... A1 \$ \_\_\_\_\_
- 2. WORKSHEET A-TOTAL ADJUSTMENTS. (Enter on Pg.1, Line 1a) ..... A2 \$ \_\_\_\_\_

**SECTION I**

OTHER INCOME

- 1. Profit/Loss from any Business Owned (Federal Schedule C)..... 1. \$ \_\_\_\_\_
- 2. Rental and/or Farm Income/Loss (Federal Schedule E or F) ..... 2. \$ \_\_\_\_\_
- 3. Partnership Income/Loss and S Corp. Shares Income/Loss (Federal Schedule E, 1065 or K-1) ..... 3. \$ \_\_\_\_\_
- 3 a. Subtotal (Add lines 1, 2, and 3) ..... 3a. \$ \_\_\_\_\_
- b. If Line 3a is a profit, then enter allowable 2017 and/or 2018 Loss of 50%, if applicable ..... 3b. \$ \_\_\_\_\_
- c. Subtotal (Subtract Line 3b from Line 3a)..... 3c. \$ \_\_\_\_\_
- 4. Other Income (Attach Taxable 1099-MISC Or Explain Source)..... 4. \$ \_\_\_\_\_
- 5. Gambling Income – (W-2G) – **(cannot offset with other schedules or 1099’s)** ..... 5. \$ \_\_\_\_\_
- 6. 4797 Income – (ordinary only) – **(cannot offset with other schedules or 1099’s)** ..... 6. \$ \_\_\_\_\_
- 7. TOTAL (Add line 3(c) **(only if profit)** to lines 4, 5, and 6)..... 7. \$ \_\_\_\_\_

**NOTE: Business/Rental losses cannot be used against W-2 wages or a 1099-MISC issued by an employer for some type of benefit or compensation.**

THE FOLLOWING IS A LIST OF WHAT INCOME IS TAXABLE AND WHAT INCOME IS NOT. PLEASE BE AWARE THAT THESE LISTS ARE NOT ALL INCLUSIVE, AND IF YOU HAVE RECEIVED ANY TYPE OF INCOME THAT DOES NOT APPEAR ON THE LIST, CONTACT THE INCOME TAX BUREAU FOR ASSISTANCE.

**TAXABLE INCOME**

**Gross wages, salaries, commission and other compensation to include:**

- 1. Sick pay and vacation pay (including annual leave).
- 2. Income from wage-continuation plans.
- 3. Stock options - taxed when exercised on amount indicated on W-2 form.
- 4. Cost of group term life insurance over \$50,000.00
- 5. Severance pay.
- 6. Compensation paid in property or the use thereof at fair market value to the same extent as taxable under the Federal Internal Revenue Act and so indicated on the W-2 from.
- 7. Tips.
- 8. Deferred Income Contribution Plans.
- 9. 401-K Contribution Plans.
- 10. Income from guaranteed annual wage contracts.
- 11. Bonuses/Prizes connected with employment.
- 12. Gambling/Lottery Winnings (Losses Not Deducted.)
- 13. Directors fees/Executor fees.
- 14. Union steward fees.
- 15. Ordinary income from Form 4797.
- 16. Profit Sharing - if from non-qualified plan.
- 17. Residents entire share, whether distributed or not, of the net profits of a subchapter S Corporation.
- 18. Jury duty

**NET PROFITS FROM:**

- Unincorporated businesses:
- a. Sole proprietorships - Schedule C
  - b. Rental properties - Schedule E
  - c. Partnerships - Schedule B
  - d. Farm Net Income - Schedule F
- Fiduciaries/Trusts and Estates (file and pay as entity)

**NON-TAXABLE INCOME**

- A. Military pay including reserve pay.
- B. Income earned while under 16 years of age.
- C. Alimony and Child Support.
- D. Capital gains - unless filed on Form 4797.
- E. Interest.
- F. Dividends.
- G. Social Security benefits.
- H. Worker’s Compensation.
- I. State unemployment benefits.
- J. Welfare payments.
- K. Income of religious, fraternal, charitable, scientific, literary or educational institutions to the extent that such income is derived from tax-exempt real estate, tax-exempt tangible or intangible property or tax-exempt activities.
- L. Housing for Clergy.
- M. Pension income - includes lump sum and deferred distributions. (includes 401-K)
- N. Annuities-at time of distribution.