

City of Urbana
Income Tax Division
225 S. Main St.
Urbana, Ohio 43078
Telephone: (937) 652-4314

CITY OF URBANA
2020 INDIVIDUAL TAX RETURN
FILE ON OR BEFORE APRIL 15, 2021

THIS SPACE FOR OFFICE USE ONLY

Taxpayer Name _____

Social Security #: _____

Spouse Name _____

Spouse Social Security #: _____

Street Address _____

☐ SINGLE
☐ MARRIED FILING JOINT RETURN (EVEN IF ONLY HAD ONE INCOME)
☐ MARRIED FILING SEPARATE RETURN, ENTER SPOUSE'S SOCIAL SECURITY NUMBER ABOVE & FULL NAME BELOW:

City _____ State _____ Zip Code _____

If moved into or out of city please list dates,

Moved into _____ Moved out _____

1. Taxable Earned Income (Typically box 5 or 18 from W-2's) Attach All W-2's \$ _____

2. Profit or Loss from Income other than Wages including small business and rental income (attach federal schedules) \$ _____

3. Total Taxable Income (Line 1 and 2) Do NOT subtract line 2 from wages \$ _____

4. Multiply Taxable Income by 1.4% Tax Amount before Credits \$ _____

5. Credits

(A) Urbana Taxes Withheld by Employer \$ _____

(B) Payments made on Declaration of Estimated Tax (including prior year overpayment) \$ _____

(C) Credit Allowed for Taxes Paid to Other Cities – see Instructions. \$ _____

Taxes paid to another municipality may be used as a credit, up to the rate of 1% of gross earnings earned in another municipality

5 (D) Total Credits (A+B+C) \$ _____

6. **Balance Due.** If line 4 is more than line 5(D), enter balance due here (No tax due if less than \$10.01) \$ _____

7. Penalty. 15% of balance due \$ _____
Non-Filing Penalty, \$25 per month, not to exceed \$150 \$ _____

8. Interest 0.42% per month (number of month____) or 5.0% annum as set by ORC 718.27 (changes annually) \$ _____

9. Total Due (Line 6 + Line 7 + Line 8) \$ _____

10. Overpayment Claimed (IF line 5 (D) exceeds line 4) \$ _____
Overpayment, To be refunded _____, Credited to next year _____

DECLARATION OF ESTIMATED TAX FOR YEAR 2021

City Ordinance (171.07)(B)(1) Declaration must be paid for the following year if taxpayer owes \$200.00 or More

11. Total Estimated Income Subject to Tax \$ _____ Multiply by Tax Rate 1.4% for Gross Estimated Tax of \$ _____

12. Less Expected Tax Credit:

A. Withheld by Employer for City of Urbana..... \$ _____

B. Overpayment from Prior years(s)..... \$ _____

C. Payments on Taxable Income to another municipality not to exceed 1% of estimated Income \$ _____

D. Total Credits \$ _____

13. Net Tax Due (Line 11 less Line 12D)..... \$ _____

14. Amount Paid with Declaration (Not Less than 1/4 of Line 13)..... \$ _____

15. TOTAL TAX DUE. ADD LINE 9 AND LINE 14. **PLEASE MAKE CHECKS PAYABLE TO CITY OF URBANA** \$ _____

Under penalties of perjury I/we declare that I/we have examined this information, including all accompanying schedules and statement and to the best of my/our belief, they are true, correct and complete.

Signature of Preparer if other than taxpayer

Signature of Tax Payer

Date

Address

Telephone Number

Spouse's Signature

Date

May we contact your preparer directly with questions regarding the preparation of the tax return?

☐ YES

☐ NO

INSTRUCTIONS

Line 1 – Include all wages received. Generally the larger of Box 5 or Box 18 from the W-2. If your W-2's are marked "various" or "all cities" in the Local Tax Withheld box, you should request an itemized breakdown by city from your employer(s). This must be attached to your return. **Do not include unemployment, pension distributions, interest or dividend 1099's.**

Line 2 – To be used for small business and/or rental income. No loss from business or rental can be used to offset wages.

Line 3 – Total taxable income.

Calculation for partial year taxpayer. ALL WAGES EARNED IN URBANA REGARDLESS OF WHERE YOU LIVED ARE ENTIRELY TAXABLE. Take total gross wages from out of town W-2's and divide by number of months that you worked there. Multiply that answer by the number of months you lived in Urbana. This gives you the amount to enter on Line 3. Proceed to Line 4 to compute tax due.

Line 4 – Multiply Line 3 by 1.4% (or 0.014) and enter the result on Line 4. This is the amount of income tax due before deducting tax withheld or estimated taxes paid.

Line 5A – Enter amount of Urbana income tax withheld by your employer that is shown on your W-2.

Line 5B – Enter the amount of estimated payments made to Urbana for the 2020 tax year. Also, include any prior year overpayments that were carried forward to 2020 tax year.

Line 5C – Enter taxes paid to another municipality. Taxes paid to another municipality may be used as a credit, up to the rate of 1% of gross earnings earned in another municipality.

Line 5D – Total of all credits 5A, 5B, and 5C.

Line 6 – Tax due, Line 4 minus Line 5D. If the amount of tax due in the current year is \$200.00 or greater, the Declaration of Estimated Tax for Year 2021 must be completed.

Line 7 – Penalty & Late Filing Fee – LATE FILING FEE – Any return filed its due date (or extended due date, if applicable) will be subject to a \$25 late filing fee for each month or partial month up to maximum of \$150. LATE PAYMENT – Taxes owed and unpaid after the due date are subject to a 15% penalty.

Line 8 – Interest – Taxes owed and unpaid after the due date are subject to a .42% (5% annum) interest per month of fraction thereof.

Line 9 – Total due for the 2020 tax year. Line 6 + Line 7 + Line 8.

Line 10 – If there is an overpayment of income taxes (Line 5D is greater than Line 4), indicate whether the overpayment is to be refunded or credited to 2021.

Declaration of Estimated Taxes for 2021

Every person who anticipates receipt of taxable income not subject to employer withholding in Urbana or who engages in a business profession, enterprise or other activity subject to Urbana taxation due shall file a declaration and pay estimated tax if they expect their 2021 tax liability to be \$200.00 or more. Estimated payments are due on April 15th, July 15th, September 15th, and December 15th, 2021.

Once the taxpayer has completed the Declaration of Estimated Taxes for 2021, the City of Urbana Income Tax Department will mail quarterly coupons to the taxpayer.