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2013 Montana Individual Income Tax Return

Form 2EZ

Income tax return for a Montana resident filing as single or married filing jointly with no dependents

| | | | | |
|--------------------------|---------------------------------|-----------|---------------------------------|-------------------------|
| <input type="checkbox"/> | First Name and Initial | Last Name | Social Security Number | Deceased? Date of Death |
| | | | | M M D D 2 0 Y Y |
| | Spouse's First Name and Initial | Last Name | Spouse's Social Security Number | Deceased? Date of Death |
| | | | | M M D D 2 0 Y Y |
| Mailing Address | | City | State | Zip+4 |

Filing Status (Mark only one box.) 1. Single 2. Married filing jointly *Note: If you are 65 or older, Form 2M or Form 2 would be a better option for you.*

Enter amounts corresponding to your federal tax return. Round to nearest dollar. If no entry, leave blank.

| | | | | |
|---|---|--|-----|----|
| Income | 3. Wages, salaries, tips, etc. Include federal Form(s) W-2..... | 3. | | 00 |
| | 4. Taxable interest and dividends. Include federal Schedule B if more than \$1,500..... | 4. | | 00 |
| | 5. Unemployment compensation..... | 5. | | 00 |
| | 6. Add lines 3 through 5 and enter the result here. This is your federal adjusted gross income..... | 6. | | 00 |
| | 7. Exempt unemployment compensation..... | 7. | | 00 |
| | 8. Exemption for certain taxed tips and gratuities..... | 8. | | 00 |
| | 9. Add lines 7 and 8; enter the result here. This is your total subtractions..... | 9. | | 00 |
| | 10. Subtract line 9 from line 6; enter the result here. This is your Montana adjusted gross income..... | 10. | | 00 |
| | 11. Enter your standard deduction from the worksheet on the back of this form..... | 11. | | 00 |
| | Tax Liability | 12. Enter \$2,280 if your filing status is single or \$4,560 if married filing jointly. This is your exemption amount..... | 12. | |
| 13. Add lines 11 and 12; enter the result here. This is your total deductions and exemptions..... | | 13. | | 00 |
| 14. Subtract line 13 from line 10 and enter the result here, but not less than zero. This is your taxable income..... | | 14. | | 00 |
| 15. Enter your tax from the tax table on the back of this form. If line 14 is zero, enter zero. This is your total tax liability..... | | 15. | | 00 |
| Tax, Payments and Refund | 16. Enter your Montana income tax withheld. Include federal Form(s) W-2 and 1099. This is your total payments..... | 16. | | 00 |
| | 17. Enter your late file penalty, late payment penalty and interest here (see instructions)..... | 17. | | 00 |
| | 18. Total voluntary check-off contribution programs from lines 18a through 18d..... | 18. | | 00 |
| | 18a. Nongame Wildlife Program <input type="checkbox"/> \$5 <input type="checkbox"/> \$10 <input type="checkbox"/> 00 other amount | | | |
| | 18b. Child Abuse Prevention <input type="checkbox"/> \$5 <input type="checkbox"/> \$10 <input type="checkbox"/> 00 other amount | | | |
| | 18c. Ag Literacy in MT Schools <input type="checkbox"/> \$5 <input type="checkbox"/> \$10 <input type="checkbox"/> 00 other amount | | | |
| | 18d. MT Military Family Relief Fund <input type="checkbox"/> \$5 <input type="checkbox"/> \$10 <input type="checkbox"/> 00 other amount | | | |
| | 19. Add lines 15, 17 and 18; enter the result here. This is the sum of your tax, penalties, interest and contributions..... | 19. | | 00 |
| 20. If line 19 is greater than line 16, enter the difference..... This is the amount you owe. ▶ | 20. | | 00 | |
| <i>Pay online at revenue.mt.gov. If writing a check, make it payable to MONTANA DEPARTMENT OF REVENUE.</i> | | | | |
| 21. If line 16 is greater than line 19, enter the difference..... This is your refund. ▶ | 21. | | 00 | |



| | | | | |
|--|---|--|----------|--|
| Direct Deposit Your Refund Complete 1, 2, 3, and 4 (please see instructions on page 4). | 1. RTN# | | 2. ACCT# | |
| | 3. If using direct deposit, you are required to mark one box. <input type="checkbox"/> Checking <input type="checkbox"/> Savings | | | |
| | 4. Is this refund going to an account that is located outside of the United States or its territories? <input type="checkbox"/> Yes <input type="checkbox"/> No | | | |

Under penalties of false swearing, 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.

| | | | | |
|--|-------------------------------------|-------------------------------------|--------------------|------|
| Your Signature is Required | Date | Daytime Telephone Number | Spouse's Signature | Date |
| X | | | X | |
| Paid Preparer's Signature | Paid Preparer's PTIN/SSN | | Firm's FEIN | |
| Third Party Designee | Third Party Designee's Printed Name | | | |
| Do you want to allow another person (such as a paid preparer) to discuss this return with us (see page 5)? | | Third Party Designee's Phone Number | | |
| <input type="checkbox"/> Yes <input type="checkbox"/> No | | | | |

Mark this box if you do not want forms and instructions mailed to you next year.

| Standard Deduction Worksheet | |
|---|---|
| 1. Enter your Montana adjusted gross income from Form 2EZ, line 10 here | 1. <input style="width: 100px;" type="text"/> |
| 2. Multiply the amount on line 1 by 20% (0.20) and enter the result here | 2. <input style="width: 100px;" type="text"/> |
| 3. Enter the amount below that corresponds to your filing status here..... | 3. <input style="width: 100px;" type="text"/> |
| <ul style="list-style-type: none"> • If your filing status is single (filing status 1), enter \$4,270. This is your maximum standard deduction. • If your filing status is joint (filing status 2), enter \$8,540. This is your maximum standard deduction. | |
| 4. Enter the amount from line 2 or 3, whichever is smaller..... | 4. <input style="width: 100px;" type="text"/> |
| 5. Enter the amount below that corresponds to your filing status..... | 5. <input style="width: 100px;" type="text"/> |
| <ul style="list-style-type: none"> • If your filing status is single (filing status 1), enter \$1,900. This is your minimum standard deduction. • If your filing status is joint (filing status 2), enter \$3,800. This is your minimum standard deduction. | |
| 6. Enter here and on Form 2EZ, line 11, the amount from line 4 or line 5, whichever is larger. This is your standard deduction..... | 6. <input style="width: 100px;" type="text"/> |

| Calculation of Interest on Underpayment of Estimated Taxes – Short Method Worksheet (If you made estimated tax payments, Form 2M or Form 2 would be a better option for you.) |
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Montana law requires you to pay your income tax liability throughout the year. You can make your payments through employer withholding, through installment payments of estimated taxes, or through a combination of employer withholding and estimated tax payments. You are not required to make estimated tax payments if one of the following conditions applies to you:

- Your combined tax liability after you applied your withholding and estimated tax payments is less than \$500.
- You did not have a 2012 income tax liability and you were a citizen or resident of the United States the entire year.
- You retired in either 2012 or 2013 after reaching the age of 62.
- You became disabled in either 2012 or 2013.
- You are a farmer or rancher and 66-2/3% of your 2013 gross income is derived from your farming and ranching operation. Your 66-2/3% farming and ranching income is determined annually and is based on your 2013 gross income. Montana does not apply a “lookback” provision in determining farming and ranching gross income.

If you did not pay in advance at least 90% of your 2013 income tax liability (after applying your credits) or 100% of your 2012 income tax liability (after applying your credits), you may have to pay interest on the underpayment of your estimated taxes.

If you are required to pay interest on your underpayment, you can use this short method to determine your interest, but only if one of the following conditions applies to you:

- You made no estimated tax payments (in other words, your only payments were Montana withholding); or
- You made four equal estimated payments by the required due dates.

If you are not eligible to use this short method to calculate your interest on your underpayment, use Montana Form EST-1, Interest on Underpayment of Estimated Tax Payments. This form is available on our website at revenue.mt.gov, or call us toll-free at (866) 859-2254 (in Helena, 444-6900).

| | |
|--|--|
| 1. Enter here your 2013 total tax liability as reported on Form 2EZ, line 15..... | 1. <input style="width: 100px;" type="text"/> |
| 2. Multiply line 1 by 90% (0.90) and enter the result here | 2. <input style="width: 100px;" type="text"/> |
| 3. Enter the amount from Form 2EZ, line 16 here | 3. <input style="width: 100px;" type="text"/> |
| 4. Subtract line 3 from line 1 and enter the result here. If your result is \$500 or less, stop here; you do not owe interest on your underpayment..... | 4. <input style="width: 100px;" type="text"/> |
| 5. Enter here the 2012 income tax liability that you reported on your 2012 Form 2, line 54; Form 2M, line 47; or Form 2EZ, line 15..... | 5. <input style="width: 100px;" type="text"/> |
| 6. Enter the smaller of line 2 or line 5 here..... | 6. <input style="width: 100px;" type="text"/> |
| 7. Enter the amount from Form 2EZ, line 16 here | 7. <input style="width: 100px;" type="text"/> |
| 8. Subtract line 7 from line 6 and enter the result here. If the result is zero or less, stop here; you do not owe interest on your underpayment. This is your total underpayment for 2013 | 8. <input style="width: 100px;" type="text"/> |
| 9. Multiply line 8 by 0.05320 and enter the result here..... | 9. <input style="width: 100px;" type="text"/> |
| 10. If you paid the amount on line 8 before April 15, multiply the amount on line 8 by the number of days you paid before April 15, and then multiply by 0.0002192..... | 10. <input style="width: 100px;" type="text"/> |
| 11. Subtract line 10 from line 9 and enter the result here and on Form 2EZ, line 17. This is your interest on underpayment of estimated taxes..... | 11. <input style="width: 100px;" type="text"/> |

| 2013 Montana Individual Income Tax Table | | | | | | | | | |
|--|-------------------|---------------------------------|--------------|------------------|-------------------------------------|-------------------|---------------------------------|--------------|------------------|
| If Your Taxable Income Is More Than | But Not More Than | Multiply Your Taxable Income By | And Subtract | This Is Your Tax | If Your Taxable Income Is More Than | But Not More Than | Multiply Your Taxable Income By | And Subtract | This Is Your Tax |
| \$0 | \$2,800 | 1% (0.010) | \$0 | | \$10,100 | \$13,000 | 5% (0.050) | \$252 | |
| \$2,800 | \$4,900 | 2% (0.020) | \$28 | | \$13,000 | \$16,700 | 6% (0.060) | \$382 | |
| \$4,900 | \$7,400 | 3% (0.030) | \$77 | | More Than \$16,700 | | 6.9% (0.069) | \$532 | |
| \$7,400 | \$10,100 | 4% (0.040) | \$151 | | | | | | |

For example: Taxable income \$6,800 X 3% (0.030) = \$204.

\$204 minus \$77 = \$127 tax