

2011 Montana Individual Income Tax Return

Form 2M

Calendar year income tax return for a Montana resident with a filing status of single, married filing jointly, or head of household

<input type="checkbox"/>	First Name and Initial	Last Name	Social Security Number	Deceased? Date of Death
<input checked="" type="checkbox"/>	Spouse's First Name and Initial	Last Name	Spouse's Social Security Number	Deceased? Date of Death
Mailing Address		City	State	Zip+4

Filing Status (Mark only one box) 1. Single 2. Married filing jointly 3. Head of household
 4. Resident full year (This form is only to be used by full-year Montana residents. Nonresidents and part-year residents must use Form 2.)

Exemptions

5a. Yourself 65 or older Blind Enter number marked 5a.

5b. Spouse 65 or older Blind Enter number marked 5b.

5c. First Name	Last Name	Social Security Number	Relationship	Disabled
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes

5d. Add lines 5a through 5c and enter total exemptions here 5d.

Enter the total number of dependents in line 5c. If more than 4 dependents, see instructions.

Federal Adjusted Gross Income

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

6. Wages, salaries, tips, etc. Include federal Form(s) W-2 6. 00

7a. Taxable interest. Include federal Schedule B if required 7a. 00

7b. Tax-exempt interest. Do not include on line 7a. 7b. 00

8. Ordinary dividends. Include federal Schedule B if required 8. 00

9. Capital gain or (loss). Include federal Schedule D if required 9. 00

10. IRA distributions.....Total amount 10a. 00 Taxable amount 10b. 00

11. Pensions and annuities.....Total amount 11a. 00 Taxable amount 11b. 00

12. Unemployment compensation.....12. 00

13. Social security benefits.....Total amount 13a. 00 Taxable amount 13b. 00

14. Taxable refunds, credits or offsets of state and local income taxes.....14. 00

15. Add lines 6 through 14 (far right column.) This is your total income.....15. 00

16. Educator expenses.....16. 00

17. IRA deduction.....17. 00

18. Student loan interest deduction.....18. 00

19. Tuition and fees.....19. 00

20. Add lines 16 through 19 and enter the result here. This is your total adjustments to income.....20. 00

21. Subtract line 20 from line 15 and enter the result here. This is your federal adjusted gross income.....21. 00

Montana Adjusted Gross Income

22. Interest and mutual fund dividends from state, county or municipal bonds from other states.....22. 00

23. Taxable federal refund.....23. 00

24. Addition to federal taxable social security.....24. 00

25. Medical care savings account nonqualified withdrawals.....25. 00

26. Add lines 22 through 25 and enter the result here. This is your Montana additions to federal adjusted gross income.....26. 00

27. Exempt interest and dividends from federal bonds, notes, and obligations.....27. 00

28. Exempt unemployment compensation.....28. 00

29. Partial pension and annuity income exemption. Complete Worksheet IV on page 24.....29. 00

30. Partial interest exemption for taxpayers 65 and older.....30. 00

31. Exemption for certain taxed tips and gratuities.....31. 00

32. Exempt medical care savings account deposits and earnings.....32. 00

33. Subtraction from federal taxable social security/Tier I Railroad Retirement. Complete Worksheet VIII on page 26.....33. 00

34. Subtraction for federal taxable Tier II Railroad Retirement.....34. 00

35. Federally taxable refunds, credits or offsets of state income taxes.....35. 00

36. Add lines 27 through 35 and enter the result here. This is your Montana subtractions from federal adjusted gross income.....36. 00

37. Add lines 21 and 26, then subtract line 36. This is your Montana adjusted gross income.....37. 00



SSN input boxes

Main tax form table with columns for Taxable Income, Tax, Credits, Payments, Penalty, Interest and Contributions, and Amount You Owe or Your Refund. Rows 38-65.



Direct Deposit section with fields for RTN#, ACCT#, and checkboxes for Checking, Savings, and international accounts.

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

Paid Preparer's Signature Paid Preparer's PTIN/SSN Firm's FEIN

Third Party Designee section with fields for name, phone number, and a checkbox for future mailings.

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Schedule I - Montana Form 2M Itemized Deductions

Enter your itemized deductions on the corresponding line.
File Schedule I with your Montana Form 2M.

Medical and Dental Expenses	1. Medical and dental expenses	1.		00	
	2. Enter amount from Form 2M, line 38	2.		00	
	3. Multiply line 2 by 7.5% (0.075)	3.		00	
	4. Subtract line 3 from line 1 and enter the result here, but not less than zero. This is your deductible medical and dental expense subject to 7.5% of Montana Adjusted Gross Income	4.			00
	5. Medical insurance premiums not deducted elsewhere on your tax return	5.			00
	6. Long term care insurance premiums not deducted elsewhere on your tax return	6.			00
Complete lines 7a through 7d reporting your total federal income tax paid in 2011 before completing line 7e.					
Taxes You Paid	7a. Federal income tax withheld in 2011	7a.		00	
	7b. Federal estimated tax payments paid in 2011	7b.		00	
	7c. 2010 federal income taxes paid in 2011	7c.		00	
	7d. Other back-year federal income taxes paid in 2011	7d.		00	
Interest You Paid	7e. Add lines 7a through 7d. Enter the result here, but not more than \$5,000 if you are filing single or head of household, or \$10,000 if filing a joint return with your spouse. This is your federal income tax deduction	7e.			00
	8. Real estate taxes paid in 2011	8.			00
	9. Personal property taxes paid in 2011 (see instructions on page 12)	9.			00
	10. Other deductible taxes. List type and amount:	10.			00
	11. Home mortgage interest and points reported to you on federal Form 1098	11.			00
	12. Home mortgage interest not reported to you on federal Form 1098. If paid to the person from whom you bought the house, provide name, SSN, and address:	12.			00
	13. Points not reported to you on federal Form 1098	13.			00
	14. Qualified mortgage insurance premiums (see instructions on page 13)	14.			00
	15. Investment interest. Include federal Form 4952	15.			00
	16. Charitable contributions made by cash or check during 2011	16.			00
	17. Charitable contributions made other than by cash or check during 2011	17.			00
	18. Charitable contribution carryover from the prior year	18.			00
	19. Child and dependent care expenses. Include Montana Form 2441-M	19.			00
	20. Casualty or theft loss(es). Include federal Form 4684	20.			00
Job Expenses and Certain Miscellaneous Deductions	21. Unreimbursed employee business expenses. Include federal Form 2106 or 2106-EZ	21.		00	
	22. Other expenses. List type and amount:	22.		00	
	23. Add lines 21 and 22; enter the result here	23.		00	
	24. Enter the amount on Form 2M, line 38 here	24.		00	
	25. Multiply line 24 by 2% (0.02) and enter the result here	25.		00	
	26. Subtract line 25 from line 23 and enter the result here, but not less than zero	26.			00
	27. Political contributions (limited to \$100 per taxpayer)	27.			00
	28. Other miscellaneous deductions not subject to 2% of Montana Adjusted Gross Income. List type and amount:	28.			00
	29. Add lines 4 through 6, 7e through 20, and 26 through 28. Enter the result here and on Form 2M, line 39. This is your total itemized deductions	29.			00



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Schedule II - Montana Form 2M Tax Credits

Enter your Montana tax credits on the corresponding line.
File Schedule II with your Montana Form 2M.

We have listed six credits that can be used when filing Montana Form 2M. However, the Montana Legislature has authorized 26 different income tax credits. See Montana Form 2, Schedule V for a list and description of these 26 tax credits that are available. If you are eligible for any of the other credits not listed below, you will have to file Montana Form 2 instead of Form 2M. For more information on the tax credits below, please see the instructions on page 14.

Nonrefundable credits that are single-year credits and HAVE NO carryover provision.

1. College contribution credit. Include Form CC.....	1.		00
2. Energy conservation installation credit. Include Form ENRG-C.....	2.		00
3. Elderly care credit. Include Form ECC.....	3.		00

Nonrefundable credits that HAVE a carryover provision that allows you to carry forward the unused portion of your credit to future tax years.

4. Alternative energy systems credit. Include Form ENRG-B.....	4.		00
5. Adoption credit. Include federal Form 8839.....	5.		00
6. Add lines 1 through 5 and enter the result here and on Form 2M, line 46. This is your total nonrefundable credits.....	6.		00

Refundable credits are applied against your income tax liability with any remaining balance refunded to you.

7. Elderly homeowner/renter credit. Include Form 2EC. Enter the result on Form 2M, line 51. (You do not need to include Schedule II if this is the only credit you are claiming.).....	7.		00
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2011 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	\$2,700	1% (0.010)	\$0		\$9,700	\$12,500	5% (0.050)	\$243	
\$2,700	\$4,700	2% (0.020)	\$27		\$12,500	\$16,000	6% (0.060)	\$368	
\$4,700	\$7,200	3% (0.030)	\$74		More Than \$16,000		6.9% (0.069)	\$512	
\$7,200	\$9,700	4% (0.040)	\$146						

For Example: Taxable Income \$6,800 X 3% (0.030) = \$204 \$204 Minus \$74 = \$130 Tax

