

or Fiscal year beginning _____, 2003 and ending _____, 2004.

Form header section including Last Name, First Name and Middle Initial, Social Security No., Spouse's Last Name if Different, Spouse's First Name and Middle Initial, Spouse's Social Security No., Mailing Address, City, State, Zip Code+4.

Filing Status section with checkboxes for Single, Married filing joint return, Married and both filing separate returns on this form, Married and both filing separate returns on separate forms, Married filing separate return and spouse is not filing, Head of Household.

Residency section with checkboxes for Resident Full Year, Nonresident Full Year, Resident Part Year, and fields for Give date of change, State moved to, State moved from.

Exemptions section including Regular, 65 or Over, Blind categories for Yourself, Spouse, and Dependents, with a table for dependent information and Total Exemptions field.

INCOME REPORTED FROM FEDERAL RETURN section, lines 6-20, including Wages, interest, dividends, business income, capital gain, supplemental gains, rents, IRA distributions, pensions, social security benefits, net farm income, and other income, with a table for taxable amounts and a Total field.

ADDITIONS section, lines 21-25, including interest and dividends on bonds, federal income tax refunds, other additions, and total additions to income.

REDUCTIONS section, lines 26-37, including Farm Risk Management Account, interest exclusions, pension and annuity income, unemployment, medical care savings, family education savings, first time home buyers account, health care professional loan payment exclusion, and other reductions.

ATTACH WITHHOLDING STATEMENTS HERE

Column A (for single joint, separate, or head of household)

Column B (for spouse only when filing separate, and box 3 is checked)

DEDUCTIONS

38. **Montana adjusted gross income** (From line 37) 38. _____

Deductions Check only one

39. (A) Standard deduction: (A) }
 (B) Itemized deductions: (B) }

40. Subtract line 39 from 38 and enter balance..... ⇒ 40. _____

Exemptions (All filers are entitled to at least one exemption)

41. Multiply \$1,780 times the number of exemptions on line 5 41. _____

42. **Taxable income.** Subtract line 41 from line 40 ⇒ 42. _____

EXEMPTIONS

STOP Nonresidents and Part-Year Residents complete and attach Schedules III and IV Form 2A, before proceeding

TAX COMPUTATION

43. Tax from table below. Non/part year residents enter the amount from line 131, Form 2A, Schedule IV. If line 42 is less than zero, enter zero here. 43. _____

44. Tax on lump sum distributions (see instructions for this line). Attach Federal Form 4972 44. _____

45. Subtotal—Add lines 43 and 44..... **Subtotal** ⇒ 45. _____

46. Credits from Form 2A, line 113, Schedule II 46. _____

47. Balance—Subtract line 46 from 45 and enter difference (but not less than zero). ⇒ 47. _____

48. Recapture investment credit Attach Form RIC. 48. _____

49. Recapture tax and withdrawal penalties (specify) 49. _____

50. For each of the programs below enter any amount you and your spouse want to contribute. Enter totals in boxes (see instructions for details).

Nongame Wildlife Program **Child Abuse Prevention** **Agriculture in Schools**

51. _____ 52. _____ 53. _____ Enter total amount in boxes..... 50. _____

54. **Total Tax**—Add lines 47, 48, 49 and 50..... **Total** ⇒ 54. _____

55. Combine amounts shown on line 54 columns A and B..... ⇒ 55. _____

PAYMENTS AND CREDITS

56. Montana tax withheld..... Attach withholding statements 56. _____

57. Payments of 2003 estimated tax and amounts credited from previous year 57. _____

58. Payment made with extension 58. _____

59. Elderly Homeowner/ Renter Credit Attach Form 2EC 59. _____

60. Total of lines 56 thru 59..... **Total** 60. _____

61. Combine amounts shown on line 60 columns A and B ⇒ 61. _____

REFUND OR AMOUNT YOU OWE

62. If line 61 is larger than line 55 enter the difference. This is your **overpayment**..... 62. _____

63. Amount on line 62 to be applied to 2004 estimate 63. _____

64. Enter the amount from line 62 you want refunded to you (refunds more than \$1.00 will be issued) **Refund**..... 64. _____

Refund Returns: Mail to Dept. of Revenue, PO Box 6577, Helena, MT 59604-6577 **Direct Deposit**

If you wish to use direct deposit enter your RTN# and ACCT# below. See instructions on page 6

RTN# _____ ACCT# _____

65. If line 55 is larger than line 61 enter **tax due** (If you owe see instructions for this line) **Tax Due** 65. _____

Send your check or money order with payment coupon to: Dept. of Revenue, PO Box 6308, Helena, MT 59604-6308.

If you choose to pay your tax due by credit card visit our website at www.discoveringmontana.com/revenue and enter your confirmation number here. See instructions on page 6.

• Check this box if at least 2/3 of your gross income is from farming. (attach breakdown of computations)

• Check here if estimated payments were made using the annualization method. (Attach Montana Form EST-P)

• Check here if you do not need state income tax forms and instructions mailed to you next year. Tax forms are also available on the internet.

Underpayment penalty See Worksheet VII, Schedule W... 66. _____

Late filing penalty-See page 2..... 67. _____

Late payment penalty-See page 2. 68. _____

Interest 1% (.01) per month..... 69. _____

Total of lines 65 through 69..... 70. _____

Extension - Check this box and attach copies of federal extension(s) to receive a valid Montana extension. See Page 2 of instructions for details.

PLEASE SIGN HERE

Name, address and telephone number of preparer _____

May the DOR discuss this return with the preparer shown above? yes no

Questions? Please call (406) 444-6900 or TDD (406) 444-2830 for hearing impaired. ☎

X _____ X _____

Your signature is required _____ Date _____ Daytime telephone number _____ Spouse signature _____ Date _____

I declare under penalty of false swearing that the information in this return and attachments is true, correct and complete.

If you electronically file, keep this form for your records (do not send to the Department of Revenue).

Tax Table

If Taxable Income is:				If Taxable Income is:			
Over	But not over	Multiply by	and Subtract = Tax	Over	But not over	Multiply by	and Subtract = Tax
\$ 0	\$ 2,200	X ... 2 %	\$ 0	\$17,800	\$22,200	X ... 7 %	\$ 466
\$ 2,200	\$ 4,400	X ... 3 %	\$ 22	\$22,200	\$31,100	X ... 8 %	\$ 688
\$ 4,400	\$ 8,900	X ... 4 %	\$ 66	\$31,100	\$44,500	X ... 9 %	\$ 999
\$ 8,900	\$13,300	X ... 5 %	\$155	\$44,500	\$77,800	X ... 10 %	\$1,444
\$13,300	\$17,800	X ... 6 %	\$288	\$77,800		X ... 11 %	\$2,222

Example = taxable income \$2,400 x 3% (.03) = \$72 subtract \$22 = \$50 tax