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2013 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

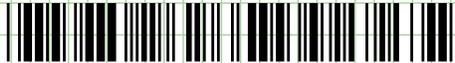
Form fields for personal information: First Name and Initial, Last Name, Social Security Number, Deceased? Date of Death, Spouse's First Name and Initial, Last Name, Spouse's Social Security Number, Deceased? Date of Death, Mailing Address, City, State, Zip+4.

Filing Status (Mark only one box) [X] 1. Single [X] 2. Married filing jointly [X] 3. Head of household

Exemptions section: 4. Resident full year, 5a. Yourself, 5b. Spouse, 5c. Dependents (First Name, Last Name, Social Security Number, Relationship, Mark if Disabled), 5d. Add lines 5a through 5c and enter total exemptions here.

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

Main tax calculation section: 6. Wages, salaries, tips, etc. Include federal Form(s) W-2; 7a. Taxable interest; 7b. Tax-exempt interest; 8. Ordinary dividends; 9. Capital gain or (loss); 10. IRA distributions; 11. Pensions and annuities; 12. Unemployment compensation; 13. Social security benefits; 14. Taxable refunds, credits or offsets of state and local income taxes; 15. Add lines 6 through 14 (far right column.) This is your total income; 16. Educator expenses; 17. IRA deduction; 18. Student loan interest deduction; 19. Tuition and fees; 20. Add lines 16 through 19 and enter the result here. This is your total adjustments to income; 21. Subtract line 20 from line 15 and enter the result here. This is your federal adjusted gross income; 22. Interest and mutual fund dividends from state, county or municipal bonds from other states; 23. Taxable federal refund; 24. Addition to federal taxable social security; 25. Medical care savings account nonqualified withdrawals; 26. Add lines 22 through 25 and enter the result here. This is your Montana additions to federal adjusted gross income; 27. Exempt interest and dividends from federal bonds, notes, and obligations; 28. Exempt unemployment compensation; 29. Partial pension and annuity income exemption. Complete Worksheet IV; 30. Partial interest exemption for taxpayers 65 and older; 31. Exemption for certain taxed tips and gratuities; 32. Exempt medical care savings account deposits and earnings; 33. Subtraction from federal taxable social security/Tier I Railroad Retirement. Complete Worksheet IV; 34. Subtraction for federal taxable Tier II Railroad Retirement; 35. Federally taxable refunds, credits or offsets of state income taxes; 36. Add lines 27 through 35 and enter the result here. This is your Montana subtractions from federal adjusted gross income; 37. Add lines 21 and 26, then subtract line 36. This is your Montana adjusted gross income.



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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.

Table with 27 rows of itemized deductions including medical expenses, federal taxes, mortgage interest, and charitable contributions. Each row includes a description, a line number, a placeholder for the amount, and a column for the amount.



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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 below six credits that you can use 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 available tax credits. 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.

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

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

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

- 4a. Alternative energy systems credit. Recognized nonfossil form of energy generation. Include Form ENRG-B..... 4a. XXXXXXXXXXXXXXXX 00
4b. Alternative energy systems credit. Low emission wood or biomass combustion device. Include Form ENRG-B..... 4b. XXXXXXXXXXXXXXXX 00
5. Adoption credit. Include federal Form 8839..... 5. XXXXXXXXXXXXXXXX 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. XXXXXXXXXXXXXXXX 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. XXXXXXXXXXXXXXXX 00

2013 Montana Individual Income Tax Table

Table with 5 columns: If Your Taxable Income Is More Than, But Not More Than, Multiply Your Taxable Income By, And Subtract, This Is Your Tax. Rows show tax rates from 1% to 6.9%.

For example: Taxable income \$6,800 X 3% (0.030) = \$204 \$204 minus \$77 = \$127 tax



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