

**BLUE ASH**INCOME TAX DIVISION  
4343 Cooper Road  
Blue Ash, Ohio 45242-5699**INDIVIDUAL****2001 — BLUE ASH EARNINGS TAX RETURN — 2001**

DUE ON OR BEFORE APRIL 30, 2002.

Tax Office Phone: (513) 745-8516

Fax # (513) 745-8651

**FEDERAL EXTENSION DOES  
NOT AUTOMATICALLY APPLY  
TO BLUE ASH****LATE FILING OF THIS RETURN SUBJECTS YOU TO INTEREST AND A MINIMUM PENALTY OF \$25.00.**

TAXPAYER'S NAME, ADDRESS

ACCOUNT NO.

CURRENT EMPLOYER \_\_\_\_\_

ADDRESS \_\_\_\_\_

SS# TAXPAYER \_\_\_\_\_ SS# SPOUSE \_\_\_\_\_

PHONE # HOME \_\_\_\_\_ WORK \_\_\_\_\_

IF MOVED SINCE THE PREVIOUS FINAL RETURN WAS DUE GIVE DATE  
OF MOVE \_\_\_\_\_

INTO BLUE ASH \_\_\_\_\_ OUT OF BLUE ASH \_\_\_\_\_

1. WAGES, SALARIES, TIPS, DEFERRED EARNED INCOME AND OTHER EMPLOYEE COMPENSATION (**ATTACH ALL W-2's**) ..... \$ \_\_\_\_\_
2. OTHER TAXABLE INCOME AND/OR DEDUCTIONS FROM LINE 20, PAGE 2 - SEE INSTRUCTIONS ..... \$ \_\_\_\_\_  
**Note: Page 2 must be completed if you have taxable rental property or business income.**  
(INTEREST, DIVIDEND, CAPITAL GAINS, UNEMPLOYMENT, AND RETIREMENT INCOME **NOT TAXABLE**)
3. TAXABLE INCOME: LINE 1 PLUS OR MINUS LINE 2 ..... \$ \_\_\_\_\_
4. BLUE ASH TAX: 1% OF LINE 3 ..... \$ \_\_\_\_\_
5. CREDITS
  - a. TAX WITHHELD BY EMPLOYER FOR BLUE ASH ..... \$ \_\_\_\_\_
  - b. 2001 ESTIMATED TAX PAID TO BLUE ASH ..... \$ \_\_\_\_\_
  - c. 2001 TAX PAID CITY OR VILLAGE OF \_\_\_\_\_ ..... \$ \_\_\_\_\_  
(NOT TO EXCEED 1% OF THAT PORTION TAXED PER W-2 - SEE INSTRUCTIONS - RESIDENTS ONLY)
  - d. PRIOR YEAR OVERPAYMENTS ..... \$ \_\_\_\_\_
  - e. TOTAL CREDITS ..... \$ \_\_\_\_\_
6. IF LINE 4 IS GREATER THAN LINE 5e PAYMENT OF BALANCE MUST ACCOMPANY THIS RETURN ..... 2001 TAX DUE ..... \$
7. OVERPAYMENT TO BE REFUNDED \$ \_\_\_\_\_ OR CREDITED \$ \_\_\_\_\_ TO NEXT YEAR'S ESTIMATE  
(If Line 5e is greater than Line 4)

No taxes or refunds of less than \$1.00 shall be collected or refunded.  
By Law, all Refunds & Credits in excess of \$10.00 are being reported to I.R.S.

**DECLARATION OF ESTIMATED TAX FOR YEAR 2002**

8. TOTAL INCOME SUBJECT TO TAX \$ \_\_\_\_\_ MULTIPLY BY TAX RATE OF 1% FOR GROSS TAX OF ..... \$ \_\_\_\_\_
9. LESS EXPECTED TAX CREDIT
  - a. WITHHELD BY EMPLOYER FOR BLUE ASH (NOT TO EXCEED 1% OF THAT PORTION TAXED) ..... \$ \_\_\_\_\_
  - b. PAYMENTS TO ANOTHER MUNICIPALITY (NOT TO EXCEED 1% OF THAT PORTION TAXED) ..... \$ \_\_\_\_\_
  - c. TOTAL CREDITS ..... \$ \_\_\_\_\_
10. NET TAX DUE FOR 2002 (LINE 8 LESS LINE 9c) ..... \$ \_\_\_\_\_
  - a. OVERPAYMENT FROM PRIOR YEAR (FROM LINE 7 ABOVE) ..... \$ \_\_\_\_\_
11. AMOUNT PAID WITH THIS DECLARATION (NOT LESS THAN 1/4 OF LINE 10, LESS LINE 10a)  \$ \_\_\_\_\_
12. TOTAL OF THIS PAYMENT (LINE 6 PLUS LINE 11)  
**MAKE CHECKS PAYABLE TO BLUE ASH INCOME TAX DIVISION**  \$ \_\_\_\_\_

**FOR TAX OFFICE USE ONLY**

Tax \$ \_\_\_\_\_ Penalty \$ \_\_\_\_\_ Interest \$ \_\_\_\_\_

Late \_\_\_\_\_ Months TOTAL DUE (Tax &amp; Assessments) ..... \$ \_\_\_\_\_

I CERTIFY 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. IF PREPARED BY A PERSON OTHER THAN TAXPAYER, THE DECLARATION IS BASED ON ALL INFORMATION OF WHICH PREPARER HAS ANY KNOWLEDGE.

Signature of Person Preparing if Other Than Taxpayer \_\_\_\_\_ Date \_\_\_\_\_

May we discuss  
this return with  
the preparer  
shown to the  
left?

Signature of Taxpayer \_\_\_\_\_ Date \_\_\_\_\_

Address \_\_\_\_\_ Telephone Number \_\_\_\_\_

☐ Yes ☐ No

Signature of Taxpayer \_\_\_\_\_ Date \_\_\_\_\_

(BLUE ASH SUGGESTS THAT YOU MAKE A PHOTOCOPY OF BOTH SIDES OF THIS RETURN AND RETAIN FOR YOUR RECORDS)

**TO BE COMPLETED BY THOSE WHO HAVE TAXABLE INCOME OTHER THAN WAGES OR  
WHO CLAIM EXPENSES AS A DEDUCTION FROM SUCH WAGES.**

**(ATTACH W-2'S HERE)**

13. TAXABLE INCOME NOT REPORTED ON W-2 (ATTACH 1099 OR FEDERAL SCHEDULES) ..... \$ \_\_\_\_\_
14. NET PROFIT (LOSS) FROM BUSINESS (ATTACH FEDERAL SCHEDULE C) ..... \$ \_\_\_\_\_
15. NET PROFIT (LOSS) FROM RENTAL AND/OR PARTNERSHIPS (ATTACH FED. SCH. E) ..... \$ \_\_\_\_\_
16. TOAL NET PROFIT FROM BUSINESS (LINE 14 PLUS LINE 15) ..... \$ \_\_\_\_\_
17. TOTAL BUSINESS LOSS FROM PREVIOUS TAX RETURNS ..... \$ \_\_\_\_\_  
(Operating losses may be carried forward for maximum period of five (5) years)
- 18A. SUBTRACT LINE 17 FROM LINE 16 (IF RESULT IS LOSS, PUT ON THIS LINE FOR ..... \$ ( \_\_\_\_\_ )  
FUTURE CARRY FORWARD) (Business activity losses MAY NOT be used to offset salary or wage earnings)
- 18B. IF THE CALCULATION ON LINE 18A (LINE 16 MINUS LINE 17) RESULTS IN A GAIN, LIST HERE ..... \$ \_\_\_\_\_
19. DEDUCTIONS AND NON-TAXABLE INCOME (SEE INSTRUCTIONS FOR BLUE ASH ALLOCATION)
- A. \_\_\_\_\_ \$ \_\_\_\_\_
- B. \_\_\_\_\_ \$ \_\_\_\_\_
- C. TOTAL DEDUCTIONS AND/OR NON-TAXABLE INCOME (LINE 19A PLUS LINE 19B) ..... \$ \_\_\_\_\_
20. TOTAL TAXABLE INCOME (LINE 13 PLUS LINE 18B, MINUS LINE 19C)  
ENTER TOTAL FROM LINE 20 ON THIS LINE AND ON LINE 2 ON FRONT OF THIS RETURN ..... \$ \_\_\_\_\_

**INSTRUCTIONS**

FOR COMPLETION OF LINES 1 THRU 20. FOR ADDITIONAL INFORMATION AND FORMS,  
VISIT OUR WEBSITE AT <http://www.blueash.com>

NOTE: Extension requests for filing must be made in writing by due date (April 30). No exemptions allowed for students or for age.

1. Should be the total of all wages received. All W-2's and/or federal schedules must be attached. (Photocopies acceptable)
  2. To be completed only if you are required to complete Page 2. NOTE: BUSINESS LOSSES MAY NOT BE USED TO OFFSET W-2 WAGES.
  - 5c. Credit for tax paid to another City can be taken by Blue Ash residents only and is limited to 1% of the amount of income on which tax was withheld. You must examine each W-2 and compute the tax credit individually—then insert the total of those tax credits on Line 5c. No credit is given for county taxes paid. If only a portion of a Blue Ash resident's income is taxed by the City of employment, the untaxed balance of the individual's income is subject to the 1% Blue Ash tax. Excess credit paid to other cities may not be applied to spouse's tax credit.
- FOR EXAMPLE: If your W-2 reflects Norwood tax withheld of \$100.00, you must reduce the credit for this payment to \$50.00 since Norwood has a 2% tax rate, and the rate for which you receive credit is limited to 1%. If earnings are taxed by another City at a rate of 1% or less, full credit may be taken. If taxes are paid directly to another municipality rather than withheld, verification **must** accompany this return.
6. Indicates amount of TAX DUE. If by making this calculation the sum on this line is one dollar or more, full payment must be received on or before the due date. Any tax remaining unpaid after the date due is subject to interest and penalty charges as prescribed by ordinance.
  7. Overpayment will be applied to estimate unless you request refund. No carryover amount will be credited if amount is less than \$1.00. A complete copy of Federal Return must accompany a request for refund.
  8. Insert amount of income you expect to make this year. Estimation should not be less than last year's earnings unless otherwise noted.
  11. You may pay the entire amount declared with the filing of this form.
  13. Any amount received from the sale of depreciable property is taxed to the extent of depreciation taken (attach Form 4797). Interest, dividend, unemployment and retirement income is not taxed.
  15. Complete if gross income on all rental property owned is \$250.00 or more per month.
  19. Deductions will be allowed only when a W-2 is attached and all expenses have been substantiated by proper schedules.
    - A. Employment expenses are allowable on the same percentage basis as wages are allocated and tax is paid to Blue Ash.
    - B. Wages earned by a resident prior to move in or after move out of Blue Ash can be adjusted here. All other uses of the line should be accompanied by proper documentation.

For those residents moving in or out of Blue Ash during the year, use Line 19B for income not subject to Blue Ash Income Tax and bring the amount as a deduction forward to Page 1, Line 2; therefore, the figure on Line 3 is the "**prorated**" amount used to figure your Blue Ash tax liability.

**NOTE:** Unless accompanied by all required substantiating documents, payment of the balance of the Tax Declared Due (Line 6) and, if required, at least 1/4 of the Estimated Tax (Line 10), this form is not a legal final return or declaration.

**2001 DECLARATION AND RETURN PAYMENT CALENDAR**

APRIL 30, 2001  
File declaration & remit 1<sup>st</sup>  
quarterly payment

JULY 31, 2001  
Remit 2<sup>nd</sup>  
quarterly payment

OCTOBER 31, 2001  
Remit 3<sup>rd</sup>  
quarterly payment

JANUARY 31, 2002  
Remit 4<sup>th</sup>  
quarterly payment

APRIL 30, 2002  
File return. Remit  
quarterly payment