



#1695#



OKLAHOMA RESIDENT INCOME TAX RETURN

Form 511 - 2012

Your Social Security Number

Place an 'X' in this box if this taxpayer is deceased → ☐

Spouse's Social Security Number (joint return only)

Place an 'X' in this box if this taxpayer is deceased → ☐NAME AND ADDRESS
PLEASE PRINT OR TYPE

Your first name, middle initial and last name

If a joint return, spouse's first name, middle initial and last name

Mailing address (number and street, including apartment number, rural route or PO Box)

City, State and Zip

NOT REQUIRED TO FILE

Place an 'X' in this box if you do not have sufficient gross income to require you to file a Federal return. (see instructions) ☐

FILING STATUS

- 1 ☐ Single
- 2 ☐ Married filing joint return (even if only one had income)
- 3 ☐ Married filing separate
- If spouse is also filing, list SSN and name in box:
- 4 ☐ Head of household with qualifying person
- 5 ☐ Qualifying widow(er) with dependent child
- Please list the year spouse died in box at right:

AGE 65 OR OVER? (Please see instructions)

☐

Yourself

☐

Spouse

EXEMPTIONS

* NOTE: If claiming Special Exemption, see instructions on page 7 of 511 Packet.

	REGULAR	*SPECIAL	BLIND
YOURSELF	<input type="text"/>	<input type="text"/>	<input type="text"/>
SPOUSE	<input type="text"/>	<input type="text"/>	<input type="text"/>
NUMBER OF DEPENDENT CHILDREN	<input type="text"/>	<input type="text"/>	<input type="text"/>
NUMBER OF OTHER DEPENDENTS	<input type="text"/>	<input type="text"/>	<input type="text"/>

ADD THE TOTALS FROM THE 4 BOXES.
WRITE THE TOTAL IN THE BOX BELOW.

TOTAL

NOTE: IF YOU MAY BE CLAIMED AS A DEPENDENT ON ANOTHER RETURN, ENTER "0" FOR YOUR REGULAR EXEMPTION.

PART ONE: TO ARRIVE AT OKLAHOMA ADJUSTED GROSS INCOME

Round to Nearest Whole Dollar

If you are not required to file, see page 5 of the 511 Packet.

- 1 Federal adjusted gross income (from Federal 1040, 1040A, or 1040EZ) . . . 1
- 2 Oklahoma Subtractions (enclose Schedule 511-A) 2
- 3 Line 1 minus line 2 3
- 4 Out-of-state income, except wages. Describe (4a) 4b
- (Enclose Federal schedule with detailed description; see instructions)
- 5 Line 3 minus line 4b 5
- 6 Oklahoma Additions (enclose Schedule 511-B) 6
- 7 Oklahoma adjusted gross income (line 5 plus line 6) 7

<input type="text"/>	00
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PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS

Oklahoma Standard Deduction:

• Single or Married Filing Separate: \$5,950

• Married Filing Joint or Qualifying Widow(er): \$11,900

• Head of Household: \$8,700

- 8 Oklahoma Adjustments (enclose Schedule 511-C) 8
- 9 Oklahoma income after adjustments (line 7 minus line 8) 9
- STOP AND READ: If line 4b is zero, complete lines 10-11. If line 4b is more than zero, see Schedule 511-D and do not complete lines 10-11.
- 10 Oklahoma standard deduction or Federal itemized deductions 10
- 11 Exemptions (\$1,000 x total number of exemptions claimed above). 11
- 12 Total deductions and exemptions (add lines 10 and 11 or amount from Sch. 511-D, line 5) . 12
- 13 Oklahoma Taxable Income (line 9 minus line 12) 13
- 14 Oklahoma Income Tax from Tax Table (see pages 20-31 of instructions)
- If using Farm Income Averaging, enter tax from Form 573, line 22 and enter a "1" in box. ☐
- If paying the Health Savings Account additional 10% tax, add additional tax here and enter a "2" in box. ☐
- STOP AND READ: If line 7 is equal to or larger than line 1, complete line 15. If line 7 is smaller than line 1, complete Schedule 511-E.
- 15 Oklahoma child care/child tax credit (see instructions) 15
- 16 Credit for taxes paid to another state (enclose Form 511TX). 16
- 17 Form 511CR - Other Credits Form. List 511CR line number claimed here.. 17
- 18 Income Tax (line 14 minus lines 15-17) Do not enter less than zero 18
- DO NOT PAY THIS AMOUNT. PAYMENT IS FIGURED ON LINE 39.

<input type="text"/>	00
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Itemized Deductions: Enclose copy of the Federal Schedule A.



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2012 Form 511 - Resident Income Tax Return - Page 2

Name(s) shown
on Form 511:Your Social
Security Number:

PART THREE: TAX, CREDITS AND PAYMENTS

For use tax table, see page 11 of the 511 Packet.	19	Total from line 18	19		00
	20	Use tax due on Internet, mail order, or other out-of-state purchases	20		00
	If you certify that no use tax is due, place an 'X' here <input type="checkbox"/>				
	21	Business Activity Tax (enclose Form 511-BAT)	21		00
	22	Balance (add lines 19, 20 and 21)	22		00
Enclose all W-2s, 1099s or other withholding statements.	23	Oklahoma withholding	23		00
	24	2012 estimated tax payments (qualified farmer <input type="checkbox"/>)	24		00
	25	2012 payment with extension	25		00
	26	Low Income Property Tax Credit (enclose Form 538-H)	26		00
See back of Form 538-S or 511 Packet for further information.	27	Sales Tax Relief Credit (enclose Form 538-S)	27		00
	28	Oklahoma Earned Income Credit (see instructions) (If line 7 is equal to or more than line 1, complete line 28. If line 7 is smaller than line 1, complete Schedule 511-F. If you are not required to file, see "Not Required to File" on page 5 of the 511 Packet for instructions)	28		00
	29	Total payments and credits (add lines 23-28)	29		00

PART FOUR: REFUND

For further information regarding estimated tax, see page 5 of the 511 Packet.	30	If line 29 is more than line 22, subtract line 22 from line 29. This is your overpayment	30		00
	31	Amount of line 30 to be applied to 2013 estimated tax	31		00
	Schedule 511-G provides you with the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Please place the line number of the organization from Schedule 511-G in the box below. If you give to more than one organization, put a "99" in the box. Enclose Schedule 511-G. <input type="checkbox"/>				
	32	Donations from your refund (total from Schedule 511-G)	32		00
	33	Total deductions from refund (add lines 31 and 32)	33		00
	34	Amount to be refunded to you (line 30 minus line 33)	34		00

Direct Deposit Note:

For Direct Deposit Information see the 511 Packet. If you do not have your refund deposited directly into your bank account, you will receive a debit card. For debit card information see "All About Refunds" in the 511 Packet.

Is this refund going to or through an account that is located outside of the United States? ☐ Yes ☐ No

Deposit my refund in my:

☐ checking accountRouting
Number:☐ savings accountAccount
Number:

PART FIVE: AMOUNT YOU OWE

If you have an underpayment of estimated tax (line 38) & overpayment (line 30), see instructions.	35	If line 22 is more than line 29, subtract line 29 from line 22. This is your tax due	35		00
	36	Donation: Eastern Red Cedar Revolving Fund	36		00
	37	Donation: Public School Classroom Support Fund	37		00
	38	Underpayment of estimated tax interest (annualized installment method <input type="checkbox"/>)	38		00
	39	For delinquent payment (add penalty of 5% plus interest at 1.25% per month)	39		00
	40	Total tax, donation, penalty and interest (add lines 35-39)	40		00

Under penalty of perjury, I declare the information contained in this document, and all attachments and schedules, is true and correct to the best of my knowledge and belief.

Place an 'X' in this box if the Oklahoma Tax Commission may discuss this return with your tax preparer. ☐

Taxpayer's signature	Date	Spouse's signature	Date	Paid Preparer's signature	Date
Taxpayer's occupation		Spouse's occupation		Paid Preparer's address and phone number	
Daytime Phone (optional)		Daytime Phone (optional)		Paid Preparer's PTIN	

Do not staple documentation to this form. To attach items, please use a paper clip.

Mailing Address for this form: P.O. Box 26800, Oklahoma City, OK 73126-0800

The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.



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2012 Form 511 - Resident Income Tax Return - Page 3

NOTE: Enclose this page ONLY if you have an amount shown on a schedule.Name(s) shown
on Form 511:Your Social
Security Number:**SCHEDULE 511-A****Oklahoma Subtractions**See instructions for details on
qualifications and required enclosures.

1	Interest on U.S. government obligations	1		00
2	Social Security benefits taxed on your Federal Form 1040 or 1040A	2		00
3	Federal civil service retirement in lieu of social security	3		00
	└ Retirement Claim Number: Taxpayer <input type="text"/> Spouse <input type="text"/>			
4	Military Retirement (see instructions for limitation)	4		00
5	Oklahoma government or Federal civil service retirement (see instructions for limitation)	5		00
6	Other retirement income	6		00
7	U.S. Railroad Retirement Board benefits	7		00
8	Oklahoma depletion	8		00
9	Oklahoma net operating loss	9		00
10	Exempt tribal income	10		00
11	Gains from the sale of exempt government obligations	11		00
12	Oklahoma Capital Gain Deduction (enclose Form 561)	12		00
13	Miscellaneous: Other subtractions (enter number in box for type of deduction) . <input type="text"/>	13		00
14	Total subtractions (add lines 1-13, enter total here and on line 2 of Form 511)	14		00

SCHEDULE 511-B**Oklahoma Additions**See instructions for details on
qualifications and required enclosures.

1	State and municipal bond interest	1		00
2	Out-of-state losses (describe _____) Enter as a positive number .	2		00
3	Lump sum distributions (not included in your Federal Adjusted Gross Income)	3		00
4	Federal net operating loss - Enter as a positive number	4		00
5	Recapture of depletion claimed on a lease bonus or add back of excess Federal depletion	5		00
6	Expenses incurred to provide child care programs	6		00
7	Recapture of Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) ..	7		00
8	Miscellaneous: Other additions (enter number in box for type of addition) <input type="text"/>	8		00
9	Total additions (add lines 1-8, enter total here and on line 6 of Form 511)	9		00

SCHEDULE 511-C**Oklahoma Adjustments**See instructions for details on
qualifications and required enclosures.

1	Military pay exclusion - Active Duty, Reserve and National Guard (not retirement income) ...	1		00
2	Qualifying disability deduction	2		00
3	Political contributions (limited to \$100 [\$200 for joint return])	3		00
4	Interest qualifying for exclusion (limited to \$100 [\$200 for joint return])	4		00
5	Qualified adoption expense	5		00
6	Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) ..	6		00
7	Miscellaneous: Other adjustments (enter number in box for type of deduction) <input type="text"/>	7		00
8	Total adjustments (add lines 1-7, enter total here and on line 8 of Form 511)	8		00



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**2012 Form 511 - Resident Income Tax Return - Page 4****NOTE: Enclose this page ONLY if you have an amount shown on a schedule.**Name(s) shown
on Form 511:Your Social
Security Number:**SCHEDULE 511-D****Deductions and Exemptions**

See instructions for details on qualifications and required enclosures.

Use this schedule if you have income from out-of-state (Form 511, line 4). Your exemptions and deductions must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income reduced by allowable adjustments except out-of-state income. If you do not have out-of-state income on Form 511, line 4, do not use this schedule. Instead complete Form 511, lines 10-11.

1	Oklahoma standard deduction or Federal itemized deductions claim	1		00
2	Exemptions (\$1,000 x number of exemptions claimed at top of Form 511)	2		00
3	Total (add lines 1 and 2)	3		00
4	Divide the amount on line 7 of Form 511 by the amount on line 3 of Form 511 <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="border: 1px solid black; width: 150px; height: 25px; margin-right: 10px;"></div> <div style="font-size: 24px; margin: 0 10px;">÷</div> <div style="border: 1px solid black; width: 150px; height: 25px; margin-left: 10px;"></div> </div> Enter the percentage from the above calculation here (do not enter more than 100%)	4		%
5	Total allowable deductions and exemptions (multiply line 3 by percentage on line 4, enter total here and on line 12 of Form 511) (Leave lines 10 and 11 of Form 511 blank)	5		00

SCHEDULE 511-E**Child Care/Child Tax Credit**

See instructions for details on qualifications and required enclosures.

If your Federal Adjusted Gross Income is \$100,000 or less and you are allowed either a credit for child care expenses or the child tax credit on your Federal return, you are allowed a credit against your Oklahoma tax. Your Oklahoma credit is the **greater** of:

- 20% of the credit for child care expenses allowed by the IRS Code.
Your allowed Federal credit cannot exceed the amount of your Federal tax reported on your Federal return.
- or**
- 5% of the child tax credit allowed by the IRS Code.
This includes both the nonrefundable child tax credit and the refundable additional child tax credit.

The credit must be prorated based on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income.

If your Federal Adjusted Gross Income is greater than \$100,000, no credit is allowed.

Enclose a copy of your Federal return and, if applicable, the Federal child care credit schedule.

1	Enter your Federal child care credit	1		00
2	Multiply line 1 by 20%	2		00
3	Enter your Federal child tax credit (total of child tax credit & additional child tax credit)	3		00
4	Multiply line 3 by 5%	4		00
5	Enter the larger of line 2 or line 4	5		00
6	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511 <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="border: 1px solid black; width: 150px; height: 25px; margin-right: 10px;"></div> <div style="font-size: 24px; margin: 0 10px;">÷</div> <div style="border: 1px solid black; width: 150px; height: 25px; margin-left: 10px;"></div> </div> Enter the percentage from the above calculation here (do not enter more than 100%)	6		%
7	Multiply line 5 by line 6. This is your Oklahoma child care/child tax credit. Enter total here and on Form 511, line 15	7		00

SCHEDULE 511-F**Earned Income Credit**

See instructions for details on qualifications and required enclosures.

You are allowed a credit equal to 5% of the Earned Income Credit allowed on your Federal return. The credit must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income. Enclose a copy of your Federal return. If you are not required to file, see "Not Required to File" on page 5 of the 511 Packet for instructions.

1	Federal earned income credit	1		00
2	Multiply line 1 by 5%	2		00
3	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511 <div style="display: flex; align-items: center; margin-top: 10px;"> <div style="border: 1px solid black; width: 150px; height: 25px; margin-right: 10px;"></div> <div style="font-size: 24px; margin: 0 10px;">÷</div> <div style="border: 1px solid black; width: 150px; height: 25px; margin-left: 10px;"></div> </div> Enter the percentage from the above calculation here (do not enter more than 100%)	3		%
4	Oklahoma earned income credit	4		00



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**2012 Form 511 - Resident Income Tax Return - Page 5****NOTE: Enclose this page ONLY if you have an amount shown on a schedule.**Name(s) shown
on Form 511:Your Social
Security Number:**SCHEDULE 511-G****Donations from Refund**

This schedule allows you to make a donation from your refund to a variety of Oklahoma organizations. Information regarding each program, their mission, how funds are utilized, and their mailing address are shown in Schedule 511-G Information. If you are not receiving a refund, but would like to make a donation to one of these organizations, Schedule 511-G Information lists the mailing address to mail your donation to the organization. If you are not receiving a refund and wish to donate to the Eastern Red Cedar Revolving Fund or the Public School Classroom Support Fund, please see line 36 or 37 of Form 511.

Place an 'X' in the box associated with the dollar amount you wish to have deducted from your refund and donated to that organization. Then carry that figure over into the column at the right. When you carry your figure back to line 32 of Form 511, please list the line number of the organization to which you donated. If you donate to more than one organization, please write a "99" in the box at line 32 of Form 511.

1	Oklahoma Wildlife Diversity Program	\$2	\$5	\$	... 1		00
2	Low Income Health Care Fund	\$2	\$5	\$	... 2		00
3	Oklahoma Breast and Cervical Cancer Fund ...	\$2	\$5	\$	... 3		00
4	Support of Programs for Volunteers to Act as Court Appointed Special Advocates for Abused or Neglected Children	\$2	\$5	\$	... 4		00
5	Oklahoma Pet Overpopulation Fund	\$2	\$5	\$	... 5		00
6	Support of the Oklahoma National Guard	\$2	\$5	\$	... 6		00
7	Oklahoma Leukemia and Lymphoma Fund	\$2	\$5	\$	... 7		00
8	Support of Programs for Regional Food Banks in Oklahoma	\$2	\$5	\$	... 8		00
9	Support of Folds of Honor Scholarship Program	\$2	\$5	\$	... 9		00
10	Y.M.C.A. Youth and Government Program	\$2	\$5	\$	... 10		00
11	Multiple Sclerosis Society Fund	\$2	\$5	\$	... 11		00
12	Support Oklahoma Honor Flights	\$2	\$5	\$	... 12		00
13	Eastern Red Cedar Revolving Fund	\$2	\$5	\$	... 13		00
14	Support of Domestic Violence and Sexual Assault Services	\$2	\$5	\$	... 14		00
15	Support of Volunteer Fire Departments	\$2	\$5	\$	... 15		00
16	Oklahoma Lupus Revolving Fund	\$2	\$5	\$	... 16		00
17	Oklahoma Sports Eye Safety Program	\$2	\$5	\$	... 17		00
18	Historic Greenwood District Music Festival Fund ..	\$2	\$5	\$	... 18		00
19	Public School Classroom Support Fund	\$2	\$5	\$	... 19		00
20	Total donations (add lines 1-19, enter total here and on line 32 of Form 511)						00

Schedule 511-G: Information**1- Oklahoma Wildlife Diversity Program**

The Oklahoma Wildlife Diversity Program is funded primarily by concerned Oklahomans. All donations provide for a variety of projects, including research on Texas horned lizards and other rare wildlife, wildlife observation activities, such as statewide educational workshops, informational brochures and posters, and management of a bat cave purchased with previous program donations. If you are not receiving a refund, you may still support Oklahoma wildlife by sending a donation to: Wildlife Diversity Program, 1801 North Lincoln, Oklahoma City, OK 73105.

2- Low Income Health Care Fund

Oklahomans helping each other is what the Indigent (Low Income) Health Care Fund is all about. Donations made to the fund are used to help provide medical and dental care for needy children and families. Every dollar you donate goes directly for health care costs. If you are not receiving a refund, you may contribute toward indigent health care by sending a donation to: Oklahoma Department of Human Services, Revenue Processing Unit, Re: Indigent Health Care Revolving Fund, P.O. Box 248893, Oklahoma City, OK 73124.

3- Oklahoma Breast and Cervical Cancer Fund

You may donate for the benefit of breast and cervical cancer early detection, public education and research. Your donation will be placed in a fund to be used for the purpose of funding programs to increase knowledge of breast and cervical cancer risk and prevention and provide mammograms, pap tests and biopsies for low-income women. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma State Department of Health, Breast and Cervical Cancer Revolving Fund, 1000 NE 10th Street, Oklahoma City, OK 73152.

4- Support for Programs for Volunteers to Act as Court Appointed Special Advocates for Abused or Neglected Children

You may donate from your tax refund to support programs for volunteers to act as Court Appointed Special Advocates for abused or neglected children. Donations will be placed in the Income Tax Checkoff Revolving Fund for Court Appointed Special Advocates. Monies will be expended by the Office of the Attorney General for the purpose of providing grants to the Oklahoma CASA Association. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma CASA Association, Inc., P.O. Box 54946, Oklahoma City, OK 73154.