



CITY OF TOLEDO 2020 EZ INDIVIDUAL RESIDENT TAX RETURN

DUE ON OR BEFORE 4/15/2021

PLEASE CHECK IF A
REFUND ☐
CREDIT TO 2021 ☐
AMENDED ☐
BALANCE DUE ☐

ACCOUNT #	SOCIAL SECURITY #
<input type="text"/>	<input type="text"/>

SPOUSE ACCOUNT #	SPOUSE SOCIAL SECURITY #
<input type="text"/>	<input type="text"/>

Single ☐ Married Filing Joint ☐ Married Filing Separate ☐

PRINT First Name, Middle Initial, Last Name

Name

Address

Phone#() Email Address

May we leave detailed messages at the above phone or email address? Yes ☐ No ☐

SPOUSE NAME First Name, Middle Initial, Last Name

Name

Address (If different from above)

PART 1 START HERE

If all answers to the following questions are TRUE, you can file the EZ Form.

I lived in Toledo for the entire year of 2020. TRUE ☐
FALSE ☐

All of my 2020 wages were reported on W-2s, and
the largest number of Box 5 or Box 18 was used. TRUE ☐
FALSE ☐

If I received W2-G's (Gambling Winnings) I have
included them in my income. TRUE ☐
FALSE ☐

I did not have a current year Schedule C, E, F loss. TRUE ☐
FALSE ☐

I will not be using a prior year Schedule C, E, F loss. TRUE ☐
FALSE ☐

I did not have Partnership Income. TRUE ☐
FALSE ☐

****Attach a copy of your W-2's, W2-G's, Schedule(s); C, E, F, and any 1099-MISC's, 1099-NEC's along with a copy of your Federal Form 1040 to include Schedule 1. Note: Your return is not considered filed until these documents are received.**

SIGNATURE

IMPORTANT: This return is NOT considered filed until signed by taxpayer and spouse (if applicable).

The undersigned declares that this return (and accompanying schedules) is a true, correct and complete return for the taxable period stated, and that the figures used are the same as used for federal income tax purposes and understands that this information may be released to the tax administration of the city of residence and the I.R.S.

Sign Here Your Signature Date

If a joint return, both must sign. Spouse Signature Date

☐ CHECK BOX IF CITY MAY DISCUSS YOUR RETURN WITH TAX

IF YOU OWE MORE THAN \$200, QUARTERLY ESTIMATE PAYMENTS ARE REQUIRED and may be subject to penalties and interest due to lack of estimated payments. Further, you may need to make estimate payments for 2021 if you expect to owe the same or greater amount next year.

Did you file a Toledo tax return in 2019? YES ☐ NO ☐

IF YES, PLEASE COMPLETE AND FILE THIS RETURN EVEN IF NOTHING OWED

Should your Tax account be inactivated? YES ☐ NO ☐

Reason:

PART 2

STEP 1. Add up all of your Municipal Income and write the total below.
(Attach all supporting documents)

STEP 2. Multiply Step 1 by 2.25% (.0225) and write below.

STEP 3. Add up amounts in Box 19 of all your W-2's and
Box 17 of your W2-G's and write total below. (Limited to 2.25%)

STEP 4. Enter the amount of Credit from 2019 and
the amount of Estimates paid for 2020 and total below.

Credit + Estimates = Total

STEP 5. Subtract the amount in Step 3 and the Total from Step 4 from the amount
in Step 2 and write total below. If a positive amount, this is your balance due. If a
negative amount, go to Step 6.

STEP 6. If the amount in Step 5 is a negative amount of more than \$10, indicate
the amount below you want refunded or credited to 2021 and check the appropriate
box at the top of this form.

Credit to 2021 Refunded:

AMOUNTS \$10 OR LESS ARE NOT DUE, PAYABLE OR CREDITED TO THE NEXT YEAR

For ON-LINE payment information, visit our website www.toledo.oh.gov.
EMAIL: incometax@toledo.oh.gov

**Payment must accompany return.
Make payable to "COMMISSIONER OF TAXATION"**

MAIL TO:

REFUND:
CITY OF TOLEDO INCOME TAX
PO BOX 902
TOLEDO, OH 43697-0902

PAYMENT ENCLOSED:
CITY OF TOLEDO INCOME TAX
PO BOX 993
TOLEDO, OH 43697-0993

NO PAYMENT ENCLOSED:
CITY OF TOLEDO INCOME TAX
PO BOX 929
TOLEDO, OH 43697-0929

Paid
Preparer's
Use Only

Your Signature Date

Print Name PTIN

Phone Number

2020 TOLEDO RESIDENT INDIVIDUAL EZ TAX RETURN FORM INSTRUCTIONS

DUE DATE: APRIL 15, 2021

This form is only for use by Toledo residents whose income is from W-2's, W-2G's, Schedules C, E or F and will not use prior year losses or have a loss in the current year.

Part-year residents: if you moved in or out of Toledo in 2020, you must use the 2020 Toledo Individual Tax Return. You cannot use the 2020 EZ Form.

Enter your account number and social security number in the boxes provided. If filing a joint return, enter the account number and social security number of your spouse in the spaces provided.

Fill in your name, address, phone number, email address and the name and address for your spouse if filing a joint return.

Answer the questions on the upper right side of the form regarding prior year and next year tax filing.

Go to Part 1 and answer each question in the boxes. Choose true or false. All answers to these questions in Part 1 must be true for you to be able to use this form. For joint filers, answer the questions for both spouses; again all answers must be true to use this form.

If all answers are true, proceed to Part 2

Step 1: Add up all your Municipal Taxable Income which includes Box 5 or Box 18 of all your W-2's whichever is greater, Box 1 of all of your W-2G's, Box 1 and/or Box 3 of your 1099-MISC(s) (Unless reported on Schedule C/E), Box 1 of your 1099-NEC(s) (Unless reported on Schedule C) Line 31 of your Federal Schedule C(s), Line 21 of your Federal Schedule E and Line 34 of your Federal Schedule F.

Step 2: Multiply Step 1 by 2.25% (.0225) and enter here. This is your Toledo income tax.

Step 3: Add all the amounts in Box 19 of your W-2(s) and Box 17 of your W-2G(s) and enter here. *(These amounts are limited to 2.25% (.0225) of the Box 18. Some municipality's income tax is greater than 2.25%. Toledo's municipal code only allows for credit up to the Toledo income tax of 2.25%)*

Step 4: Enter the amount of credit from 2019 as indicated on your 2019 return. Also, enter any estimated tax payments that you made for the tax year 2020. Add these amounts together and enter here.

Step 5: Subtract the amount in Step 3 and the Total amount in Step 4 from the amount in Step 2 and enter in this box. If the calculation in Step 5 is a positive amount, **STOP** this is your balance of tax due. If the amount is less than \$10 you do not owe this amount. **However, your tax return must still be filed.** If the calculation in Step 5 is a negative amount, proceed to Step 6. For balances due, please remit your payment made payable to the "Commissioner of Taxation" with the return. Credit/Debit card payment information can be found on our website (www.toledo.oh.gov). Please check the "Balance Due" box in the upper right corner of the tax return.

Step 6: If the amount from Step 5 is a negative amount and is \$10 or greater, the amounts you would like to be credited to 2021, refunded or split. Please check the box in the upper right-hand corner as to a "Refund" or "Credit to 2021". **If the amount is less than \$10 your return must still be filed.**

Make sure you sign the return in the signature box (both spouses must sign for joint filing to be accepted). Attach a copy of page 1 of your Federal Tax Return (1040, 1040A or 1040EZ) and a copy of your W2's, W2-G's, Schedule C, Schedule E and Schedule F (whichever apply) to the back of the return. If you are claiming a deduction on your Federal Schedule C for "Contract Labor", and any of the individuals/companies are over \$600, you must submit a copy of the 1099-MISC and/or 1099-NEC that you issued to these individuals/companies.

If the positive amount due in Step 5 is more than \$200.00, you need to make quarterly estimates for the tax year 2021 if you expect your income to be greater or remain the same. Further, you may be subject to penalties and interest for lack of estimate payments for 2020. (See Note below)

If you use a paid preparer, they should sign in the box provided and you should check the box if we may discuss the return with them.

If you are requesting that your account be inactivated due to moving from the City of Toledo with no intent to return, although retaining a mailing address within the City of Toledo as your address of record, please enter the date of your move and the reason and attach supporting documentation with regard to your relocation.

Note: (Estimate payments are required if you owe more than \$200 after credit for tax withheld. If 90% of the tax liability due for the current tax year or 100% of the tax liability for the preceding tax year is not paid in estimate form by January 15th of the following tax year, you are subject to penalties and interest even if the tax is paid in full by the due date of the return. Note that the preceding tax year must have been for a full 12 month period and that the tax return was filed).