

IMPORTANT TAX NOTICE

Dear New Resident,

Welcome to Montgomery!

You have chosen an outstanding community as your home. Today's Montgomery is an integral part of the Cincinnati metropolitan area and features beautiful neighborhoods, excellent community parks, top-quality services, and a nationally recognized school system. For more information about Montgomery, please visit our website at www.montgomeryohio.org.

As a Montgomery resident, you are required to file a tax return with the City of Montgomery. The City's income tax applies to all who live, work, operate a business or perform a service in Montgomery. The City of Montgomery has a 1% tax levied on all earned income, which includes but is not limited to: salaries and wages, employee contributions to deferred compensation plans and other qualified retirement plans, group life insurance benefits, stock option income, etc. and the net profit of any business income, including Schedule C, rental income, gambling winnings and other business activities. All residents receiving an income are subject to the tax, including those who rent their residence.

Montgomery has mandatory filing, which requires all residents who receive an income to file an annual return whether or not tax is due.

Residents employed in another city where the tax rate is 1% or higher, and whose wages are totally taxed by that city, will receive credit, not to exceed 1%, for the amount of tax paid to that municipality. If a resident's income is only partially taxable to the city where employed, that portion of income that is not taxed becomes taxable to the City of Montgomery.

An annual return for the previous year is due on or before April 15th, or the Federal equivalent. Copies of all W-2 forms and the first page of the Federal Form 1040, along with any applicable schedules must accompany the return. A declaration of estimated tax for the current year, along with payment for first quarter tax, is also due on or before April 15th. Quarterly statements will be billed.

To ensure the accuracy of our records, please complete and return an Individual New Account Registration form. **If you have purchased a home but have not yet moved in, please indicate your estimated move-in date on the questionnaire.**

If you have any questions, please call 513-891-2424 and ask for the Tax Office. The City welcomes you and appreciates your efforts to comply with our laws.