

CITY OF OAKWOOD INCOME TAX

CITY OF OAKWOOD
INCOME TAX DEPARTMENT
30 Park Avenue
Oakwood, Ohio 45419-3400
(937) 298-0531

REFUND REQUEST FORM

PART ICheck at least one: ☐ Non-Resident ☐ Under Age 18**TO BE USED ONLY BY PERSONS UNDER AGE 18 AND FULL-YEAR, NON-RESIDENT INDIVIDUALS WITH W-2 WAGE INCOME**

A. NAME AND CURRENT ADDRESS For the Calendar Year _____
Refund Claimed \$ _____
Social Security No. _____

Address during claim period: _____

Employer's Name and Address: _____

B. COMPUTATION OF OVERPAYMENT:

1. Income Earned (Typically Box 5 of form W-2). \$ _____
2. Oakwood Tax Withheld (attach copy of form W2) \$ _____
3. Earnings Subject to Oakwood Tax \$ _____
4. Oakwood Tax (2.5% of line 3) \$ _____
5. Overpayment Claimed (line 2 minus line 4) \$ _____

Please note that in accordance with Ohio Revised Code Section 718.19, refunds requested of \$10.00 or less cannot be issued.

C. BASIS FOR REFUND: Give brief but complete explanation. If applicable, complete days out computation on page 2.The City of Oakwood will furnish your city of residence and any employment city a copy of this refund document.

The undersigned declares that all information given is true and complete to the best of his/her knowledge and belief, that a refund has not previously been claimed or received by him/her for the period covered by this claim.

SIGNED: _____ DATE: _____
(Claimant's Signature)**PART II - EMPLOYER'S CERTIFICATION (Read Carefully) – Not required for persons under age 18**

During 20____, City of Oakwood Income Tax in the amount of \$ _____ was withheld from the above-named employee's wages in excess of his/her liability based on the above stated facts and the computation shown on the reverse side of this form.

No portion of said taxes has been or will be refunded directly to the employee and no adjustment to our withholding account with the City of Oakwood has been or will be made for said tax.

EMPLOYER NAME: _____ FEI #: _____

AUTHORIZED SIGNATURE: _____ DATE: _____

PRINTED NAME: _____ TITLE: _____

REFUND REQUEST GENERAL INSTRUCTIONS

This form is to be used only by persons under the age of 18 and/or full-year, non-resident individuals claiming a refund of Oakwood income tax withheld in excess of their actual liability.

Please attach a copy of your form W-2. If you are under the age of 18, you must provide verification of your age (driver's license, certificate of birth or passport).

SECTION A: List name, present address, calendar year of refund claim, amount of refund and your social security number. List address during claim period if different from your current address. List your employer's name and your physical work address.

SECTION B:

1. Enter total wages subjected to Oakwood tax by your employer. Typically, this will be reported in Box 18 of your form W-2.
2. Enter the Oakwood tax withheld as shown in Box 19 of your form W-2.
3. Enter the wages which should have been subject to Oakwood tax. Persons under the age of 18 for the entire year should enter zero. If you turned age 18 during the year, attach computation showing wages earned prior to and after turning 18. All other filers should complete the days worked outside Oakwood computation below.
4. Line 3 x 2.5% (0.025).
5. Enter the difference between Line 2 and Line 4. Amount of refund requested must exceed \$10.00.

SECTION C: Basis for refund: A brief but complete explanation by the taxpayer is required regarding the reason for the overpayment to be refunded. If duties require travel, you must provide a list of dates worked out of Oakwood including the physical address where services were performed.

DAYS OUT: For days worked outside Oakwood, compute the amount to be entered as taxable wages (Line 3) by multiplying the total compensation by the ratio of actual days worked. Days worked only refers to the actual number of days on the job.

| | | |
|--|-------|---------|
| Total days available | | _____ |
| Less: Vacation days | | _____ |
| Sick days | | _____ |
| Holiday days | | (_____) |
| (A) Total Available Working Days | | _____ |
| Less: Days worked outside city (attach schedule) ... | | (_____) |
| (B) Days worked in the City of Oakwood | | _____ |

(B) Days worked in the City of Oakwood

(A) Total available working days X Total Income = Adjusted Oakwood Taxable Income
(Enter Page 1, Line B 3)

(B) _____
(A) _____ X \$ _____ = \$ _____