

2000 FORM 511-RF OKLAHOMA CLAIM FOR REFUND

For taxpayers who are not required to file an Oklahoma return.

Your Social Security Number →

Spouse's Social Security Number →

Print first name, initial and last name (first name and initial of spouse)

Present home address (number and street, including apartment number, or rural route)

City, State and Zip

FILING STATUS...

- Enter the number in the box from the list below which shows your filing status:
- 1 - Single
 - 2 - Married filing jointly
 - 3 - Married filing separately
 - 4 - Head of Household
 - 5 - Qualified Widow(er)

RESIDENCY STATUS...

- Please check the appropriate box:
- Resident
 - Part-Year Resident
 - Nonresident

EXEMPTIONS...

If you may be claimed as a dependent on another return, enter "0" for yourself.

	Regular	65 or over	Blind	Totals
A. Yourself	<input type="checkbox"/>	+ <input type="checkbox"/>	+ <input type="checkbox"/>	= <input type="checkbox"/>
B. Spouse	<input type="checkbox"/>	+ <input type="checkbox"/>	+ <input type="checkbox"/>	= <input type="checkbox"/>
C. Number of your dependent children				<input type="checkbox"/>
D. Number of other dependents				<input type="checkbox"/>
E. Total exemptions claimed (add A, B, C, and D)				<input type="checkbox"/>

OCCUPATION... Yourself: _____ Spouse: _____

NOTICE... This form shall be used only if:

- 1 A. You are an Oklahoma **resident**, and you do not have sufficient gross income to require you to file a Federal return. *(If you are required to file a Federal return, then you are required to file a Form 511 or 511EZ and do not qualify to file this form.) For Federal filing requirements, see Chart A or B on the back of this form.*
or
B. You are a **nonresident** and you do not have an Oklahoma filing requirement. *(If you are required to file an Oklahoma return, use Form 511NR. You do not qualify for this form.) For the Oklahoma filing requirement, see Chart C on the back of this form.*
- 2 You had Oklahoma income tax withheld or you have paid estimated tax.

ENCLOSE COPIES OF ALL FORM(S) W-2 AND 1099. (ROUND TO NEAREST DOLLAR)

1. Residents: Income subject to Federal filing requirements, or Nonresidents: Total Oklahoma source gross income	1		00
2. Oklahoma income tax withheld	2	00	
3. 2000 Oklahoma estimated tax payments	3	00	
4. 2000 Payment with extension	4	00	
5. Low Income Property Tax Credit (Residents only - enclose Form 538H) ..	5	00	
6. Sales Tax Credit (Residents only - enclose Form 538S)	6	00	
7. May 3, 1999 Tornado Tax Credit (Residents only - enclose Form 510)	7	00	
8. Total: Add lines 2 thru 7	8		00
9. Deductions from refund: If you wish to donate from your tax refund, check and enter amount.			
9a: Oklahoma Wildlife Diversity Program: \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$____ <input type="checkbox"/>	9a	00	
9b: Low Income Health Care Fund: \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$____ <input type="checkbox"/>	9b	00	
9c: Veteran Affairs Capital Improvement Program: \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$____ <input type="checkbox"/> ...	9c	00	
9d: Oklahoma Breast Cancer Program: \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$____ <input type="checkbox"/>	9d	00	
9e: Oklahoma City Bombing Memorial Fund: \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$____ <input type="checkbox"/> ..	9e	00	
10. Total: Add lines 9a, 9b, 9c, 9d and 9e	10		00
11. Amount to be refunded to you: Subtract line 10 from line 8	11		00

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

Taxpayer's Signature and Date	Spouse's Signature and Date
Paid Preparer's Signature and Date	Paid Preparer's Address

Mail to:
Oklahoma Tax Commission
P.O. Box 26800
Oklahoma City, OK 73126-0800

➔ Residents use Chart A or B. Nonresidents use Chart C.

CHART A: FEDERAL FILING REQUIREMENTS FOR MOST PEOPLE

To use this chart, first find your filing status. Then read across to find your age at the end of 2000. You must file a return if your gross income was at least the amount shown in the last column.

If your Filing Status Is...	And your Age Is*...	And if your Gross Income Is... **
Single	Under 65	\$ 7,200
	65 or older	\$ 8,300
Married Filing Joint***	Both under 65	\$12,950
	One 65 or older	\$13,800
	Both 65 or older	\$14,650
Married Filing Separate	Any age	\$ 2,800
Head of Household	Under 65	\$ 9,250
	65 or older	\$10,350
Qualifying Widow(er) with a Dependent Child	Under 65	\$10,150
	65 or older	\$11,000

*If you turned age 65 on January 1, 2001, you are considered to be 65 at the end of 2000.

**Gross income means all the income you received in the form of money, goods, property, and services that is not exempt from tax.

Do not include social security benefits unless you are married filing separate and you lived with your spouse at any time in 2000.

***If you did not live with your spouse at the end of 2000 (or on the date your spouse died) and your gross income was at least \$2,800, you must file a return regardless of your age.

CHART B: FEDERAL FILING REQUIREMENTS FOR CHILDREN AND OTHER DEPENDENTS

If your parent (or someone else) can claim you as a dependent, use the chart to see if you must file a Federal return.

In these charts, unearned income includes taxable interest and dividends. Earned income includes wages, tips, and taxable scholarships and fellowships.

SINGLE DEPENDENTS

Were you either **age 65 or older** or **blind**?

No. You must file a return if **any** of the following apply...

- Your unearned income was over \$700.
- Your earned income was over \$4,400.
- The total of your unearned and earned income was more than the **larger** of:

<u>This amount</u> \$700	OR	<u>This amount</u> Your earned income (up to \$4,150) plus \$250
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Yes. You must file a return if **any** of the following apply...

- Your earned income was over \$5,500 (\$6,600 if 65 or older **and** blind).
- Your unearned income was over \$1,800 (\$2,900 if 65 or older **and** blind).
- Your gross income was more than:

<u>The larger of...</u> • \$700, or • Your earned income (up to \$4,150) plus \$250	PLUS	<u>This amount</u> \$1,100 (\$2,200 if 65 or older and blind)
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MARRIED DEPENDENTS

Were you either **age 65 or older** or **blind**?

No. You must file a return if **any** of the following apply...

- Your gross income was at least \$5 and your spouse files a separate return and itemizes deductions.
- Your unearned income was over \$700.
- Your earned income was over \$3,675.
- The total of your unearned and earned income was more than the **larger** of:

<u>This amount</u> \$700	OR	<u>This amount</u> Your earned income (up to \$3,425) plus \$250
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Yes. You must file a return if **any** of the following apply...

- Your earned income was over \$4,525 (\$5,375 if 65 or older **and** blind).
- Your unearned income was over \$1,550 (\$2,400 if 65 or older **and** blind).
- Your gross income was at least \$5 and your spouse files a separate return and itemizes deductions.
- Your gross income was more than:

<u>The larger of...</u> • \$700, or • Your earned income (up to \$3,425) plus \$250	PLUS	<u>This amount</u> \$850 (\$1,700 if 65 or older and blind)
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CHART C: OKLAHOMA FILING REQUIREMENT FOR NONRESIDENTS

Every nonresident with Oklahoma source gross income of \$1,000 or more is required to file an Oklahoma income tax return (Form 511NR).