

OKLAHOMA TAX COMMISSION • CLAIM FOR REFUND
For Resident taxpayers who are NOT required to file a Federal return.

1999 FORM 511-RF

Filing Status (same as Federal): Enter number from list at right which shows your filing status. (1) Single, (2) Married filing jointly, (3) Married filing separately, (4) Head of household, (5) Qualifying Widow(er). SOCIAL SECURITY NUMBERS grid.

First name and initial (if joint return, give first names and initials of both) Last Name. Present home address (number and street, including apartment number, or rural route). City, State and ZIP. Occupation: Yourself, Spouse. Total Exemptions: Write the number of allowable exemptions.

caution:

NOTICE

- (1) This form shall be used ONLY if: You are a resident of Oklahoma for the full year.
(2) You do not have sufficient gross income to REQUIRE you to file a Federal return.
(3) You had Oklahoma income tax withheld from your wages or retirement income or you have paid Estimated Tax.

1. a. Total gross income from all sources (taxable and non-taxable) 1a.
b. Less non-taxable income (i.e. Social Security benefits received) 1b.
c. Income subject to Federal filing requirements (Line 1a minus line 1b) 1c.
2. Oklahoma Income Tax Withheld (enclose W-2's and 1099's having withholding) 2
3. 1999 Oklahoma Estimated Tax Payments ... 3
4. 1999 Payment With Extension ... 4
5. Total lines 3 and 4 ... 5
6. Low Income Property Tax Credit (enclose Form 538-H) ... 6
7. Sales Tax Credit (enclose Form 538-S) ... 7
8. Total (Add lines 2, 5, 6, and 7) ... 8
9. DEDUCTIONS FROM REFUND: If you wish to donate from your tax refund, check and enter amount:
A. Okla. Wildlife Diversity Program.
B. Low Income Health Care Fund.
C. Veterans Affairs Capital Improvement Program.
D. Oklahoma Breast Cancer Research Program.
10. Total: Add lines A, B, C, and D, and enter amount ... 10
11. Amount to be refunded to you (line 8 minus line 10) ... Refund 11

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 Date Spouse's signature Date
Paid Preparer's signature Date Paid Preparer's Address
Oklahoma Tax Commission Income Tax P.O. Box 26800 Oklahoma City, OK 73126-0800

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 1999. You must file a return if your **gross income**** was at least the amount shown in the last column.

Filing Status	Age*	Gross Income**
Single	under 65	7,050
	65 or older	8,100
Married, filing jointly	under 65 (both spouses)	12,700
	65 or older (one spouse)	13,550
	65 or older (both spouses)	14,400
Married, filing separately	any age	2,750
Head of household	under 65	9,100
	65 or older	10,150
Qualifying widow(er) with dependent child	under 65	9,950
	65 or older	10,800

* If you turned age 65 on January 1, 2000, you are considered to be age 65 at the end of 1999.

** **Gross income** means all income you received in the form of money, goods, property, and services that is not exempt from tax, including any gain on the sale of your home (even if you may exclude or postpone part or all of the gain). **Do not** include social security benefits unless you are married filing a separate return and you lived with your spouse at any time in 1999.

Chart B - Federal Filing Requirements For Children and Other Dependents

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

In this chart, **unearned income** includes taxable interest and dividends. **Earned income** includes wages, tips, and taxable scholarship and fellowship grants.

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 \$4,300.
- The total of your unearned and earned income was more than the **larger** of -

This amount: \$700	OR	This amount: Your earned income (up to \$4,050) plus \$250
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Yes. You must file a return if **any** of the following apply.

- Your earned income was over \$5,350 (\$6,400 if 65 or older **and** blind).
- Your unearned income was over \$1,750 (\$2,800 if 65 or older **and** blind).
- Your gross income was more than -

The larger of: ● \$700, or ● Your earned income (up to \$4,050) plus \$250.	PLUS	This amount: \$1,050 (\$2,100 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 \$3,600.
- The total of your unearned and earned income was more than the **larger** of -

This amount: \$700	OR	This amount: Your earned income (up to \$3,350) plus \$250
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Yes. You must file a return if **any** of the following apply.

- Your earned income was over \$4,450 (\$5,300 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 -

The larger of: ● \$700, or ● Your earned income (up to \$3,350) plus \$250.	PLUS	This amount: \$850 (\$1,700 if 65 or older and blind)
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