

OKLAHOMA RETURN OF ORGANIZATION EXEMPT FROM INCOME TAX



Form 512E - 2012

Section 501(c) of the Internal Revenue Code

| | | |
|---------------|--|--|
| PART 1 | For the year January 1 - December 31, 2012, or other taxable year beginning: <input type="text"/> , 2012 ending: <input type="text"/> , <input type="text"/> | AMENDED RETURN! If this is an Amended Return place an 'X' here <input type="checkbox"/> → |
| | | |

| | | |
|--|--------------------------------------|------------------------|
| Name of Organization | | OFFICE USE ONLY |
| Address (number and street) | | |
| City, State and Zip | | |
| Federal Employer Identification Number | Date Qualified for Tax Exempt Status | |

Enter the name and address used on your return for prior year (if same, write "same"). If none filed, give reason.

PART 2: STATEMENT OF UNRELATED BUSINESS TAXABLE INCOME (Please read instructions on pages 2-4)

| | Total Federal | Allocable Oklahoma |
|---|---------------|--------------------|
| A. Total unrelated trade or business income - applicable Federal Form(s) 990 | | |
| B. Total unrelated trade or business deductions - applicable Fed. Form(s) 990 | | |
| C. Unrelated business taxable income - Enter here and on line 1 below | | |

| INCOME SUBJECT TO TAX | | | |
|---|---|--|----|
| 1. Unrelated business taxable income - from statement above (allocable to Oklahoma) | 1 | | 00 |
| 2. Other net income - enclose schedule | 2 | | 00 |
| 3. Oklahoma taxable income (total of lines 1 and 2) | 3 | | 00 |

| TAX COMPUTATION | | | |
|--|---|--|----|
| 4. Tax at 6% of line 3 (If Trust - See Rate Schedule on page 2) | 4 | | 00 |
| 5. Amount paid on 2012 estimate | 5 | | 00 |
| 6. Oklahoma withholding (enclose Form 1099, Form 500A, Form 500B or other withholding statement) | 6 | | 00 |
| 7. Add lines 5 and 6 and enter amount | 7 | | 00 |
| 8. Overpayment (if line 7 is larger than line 4 enter amount overpaid) | 8 | | 00 |
| 9. Amount of line 8 to be credited to 2013 estimated tax | 9 | | 00 |

| | | | |
|--|----|--|----|
| Line 10 instructions provide you the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Place the line number of the organization from the instructions to this form in the box below and enter the amount you are donating. If giving to more than one organization, put a "99" in the box and attach a schedule showing how you would like your donation split. | | | |
| 10. Donations from your refund..... <input type="checkbox"/> \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$ _____ | 10 | | 00 |
| 11. Add lines 9 and 10 and enter amount | 11 | | 00 |
| 12. Amount to be refunded to you (line 8 minus line 11)..... Refund | 12 | | 00 |

Direct Deposit Note:
All refunds must be by direct deposit. See Direct Deposit Information on page 4 for details.

Is this refund going to or through an account that is located outside of the United States? Yes No

Deposit my refund in my:

checking account Routing Number:

savings account Account Number:

| | | | |
|---|----|--|----|
| 13. Tax Due (if line 4 is larger than line 7 enter tax due) | 13 | | 00 |
| 14. Donation: Public School Classroom Support Fund..... <input type="checkbox"/> \$2 <input type="checkbox"/> \$5 <input type="checkbox"/> \$ _____ | 14 | | 00 |
| (For information regarding this fund, see page 4, #17) | | | |
| 15. For delinquent payment, add penalty of 5% _____ plus interest at 1 1/4% per month | 15 | | 00 |
| 16. Underpayment of estimated tax interest (enclose Form OW-8-P)..... | 16 | | 00 |
| 17. Total tax, donation, penalty and interest due - Add lines 13-16; pay in full with return. Balance Due | 17 | | 00 |

PART 3: SIGNATURE AND VERIFICATION

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

| | | | | |
|---------------------------------|-----------------------------|--|-----------------------|------------------|
| Signature of Officer or Trustee | Date | Check this box if the Oklahoma Tax Commission may discuss this return with your tax preparer. <input type="checkbox"/> | Signature of Preparer | Date |
| Print Name | | | Preparer's Address | |
| Title | Phone Number with Area Code | | Phone Number: | Preparer's PTIN: |

GENERAL INSTRUCTIONS

- Every organization shall make a return for each year. 68 Oklahoma Statutes (OS) Section 2368.
- Parts 1 and 3 must be completed by all organizations. If you were required to file an annual information return with the Internal Revenue Service, enclose a copy of the information return including any supporting schedules (e.g. Form 990, 990-EZ, 990-PF).
- Part 2 is to be completed by organizations who have unrelated trade or business income. If you were required to file an income tax return with the Internal Revenue Service, enclose a copy of the tax return including any supporting schedules (e.g. Form 990-T).
- The filing date shall be the same as required by the Internal Revenue Code.
- Exempt Organizations are subject to tax on unrelated business income. 68 OS Sec. 2359.
- Investment income of Exempt Organizations subject to Federal Excise tax is not subject to Oklahoma Income Tax; however, any income subject to income tax under the Internal Revenue Code is subject to Oklahoma Income Tax.
- Complete the Oklahoma Statement of Unrelated Business Income and attach a schedule of any other taxable income.
- Total Unrelated Trade or Business Deductions includes the "specific deduction" allowed on the Federal return.
- If you do not have a Federal Employer Identification Number, you may obtain one by visiting the IRS website at **www.irs.gov** or by calling the Internal Revenue Service at (800) 829-4933.

NOTE: If exempt organization is a trust, the following rates apply.

| If taxable income is: | <u>At least</u> | <u>But less than</u> | | | | | | | |
|-----------------------|-----------------|----------------------|-----------|-----------------------------|---|-------|------------|-------|--|
| -0- | - | 1,000 | Pay | 1/2 of 1% of Taxable Income | | | | | |
| 1,000 | - | 2,500 | Pay | 5.00 | + | 1% | over | 1,000 | |
| 2,500 | - | 3,750 | Pay | 20.00 | + | 2% | over | 2,500 | |
| 3,750 | - | 4,900 | Pay | 45.00 | + | 3% | over | 3,750 | |
| 4,900 | - | 7,200 | Pay | 79.50 | + | 4% | over | 4,900 | |
| 7,200 | - | 8,700 | Pay | 171.50 | + | 5% | over | 7,200 | |
| 8,700 | - | over | Pay | 246.50 | + | 5.25% | over | 8,700 | |

The Oklahoma Tax Commission is not required to give actual notice to taxpayers of changes in any state tax law.

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

DONATIONS FROM REFUND

1 - Oklahoma Wildlife Diversity Program

The Oklahoma Wildlife Diversity Program is funded primarily by concerned Oklahomans. All donations provide for a variety of projects, including research, wildlife observation activities, workshops, informational brochures and posters.

2 - Oklahoma Breast and Cervical Cancer Program

You may donate for the benefit of breast and cervical cancer early detection, public education and research. Your donation will be placed in a fund to be used for the purpose of funding programs to increase knowledge of breast and cervical cancer risk and prevention and to provide mammograms, pap tests and biopsies for low income women.

3 - Support of Programs for Volunteers to Act as Court Appointed Special Advocates for Abused or Neglected Children

You may donate from your tax refund to support programs for volunteers to act as Court Appointed Special Advocates for abused or neglected children. Donations will be placed in the Income Tax Checkoff Revolving Fund for Court Appointed Special Advocates. Monies will be expended by the Office of the Attorney General for the purpose of providing grants to the Oklahoma CASA Association.

DONATIONS FROM REFUND - CONTINUED

4 - Oklahoma Pet Overpopulation Fund

You may donate from your tax refund for the benefit of the Oklahoma Pet Overpopulation Fund. Monies placed in this fund will be expended by the Department of Agriculture, Food and Forestry for the purpose of developing educational programs on pet overpopulation and for implementing spay/neuter efforts in this state.

5 - Support of the Oklahoma National Guard

You have the opportunity to donate from your tax refund for the benefit of providing financial relief to qualified members of the Oklahoma National Guard and their families. Donations will be placed in the Income Tax Checkoff Revolving Fund for the Support of the Oklahoma National Guard Relief Program. Monies, to assist Oklahoma National Guard members and their families with approved hardship expenses, will be expended by the Military Department.

6 - Oklahoma Leukemia and Lymphoma Fund

You have the opportunity to donate from your tax refund for the benefit of the Oklahoma Leukemia and Lymphoma Revolving Fund. Monies from the fund will be used by the State Department of Health for the purpose of supporting voluntary health agencies dedicated to curing Leukemia, Lymphoma, Hodgkin's Disease, and Myeloma and to improving the quality of life of patients and their families.

7 - Support of Programs for Regional Food Banks of Oklahoma

You may donate from your tax refund for the benefit of the Regional Food Bank of Oklahoma and the Community Food Bank of Eastern Oklahoma (Oklahoma Food Banks). The Oklahoma Food Banks are the largest hunger-relief organizations in the state - distributing food to charitable and faith-based feeding programs throughout all 77 counties in Oklahoma. Your donation will be used to help provide food to the more than 500,000 Oklahomans at risk of hunger on a daily basis.

8 - Support of Folds of Honor Scholarship Program

You have the opportunity to donate from your tax refund to support the Folds of Honor Foundation. Folds of Honor is a 501(c)(3) charitable organization that provides post-secondary educational scholarships for children and spouses of military service men and women killed or disabled while serving in the war in Iraq or Afghanistan.

9 - Y.M.C.A. Youth and Government Program

You have the opportunity to donate from your tax refund for the benefit of the Oklahoma chapter of the Y.M.C.A. Youth and Government program. Monies donated will be expended by the State Department of Education for the purpose of providing grants to the Program so young people may be educated regarding government and the legislative process.

10 - Multiple Sclerosis Society Fund

You may donate for the benefit of research toward a cure for Multiple Sclerosis. Your donation will be placed in a fund for the purpose of providing grants to the Multiple Sclerosis Society for purposes of mobilizing people and resources to drive research for a cure and to address the challenges of everyone affected by multiple sclerosis.

11 - Support Oklahoma Honor Flights

You have the opportunity to donate any amount of your tax refund to support Oklahoma Honor Flights. Oklahoma Honor Flights is a 501(c)(3) not-for-profit organization that transports Oklahoma World War II veterans to Washington, D.C. to visit the memorial dedicated to honor their service and sacrifice.

12 - Support of Domestic Violence and Sexual Assault Services

You may donate from your tax refund for the benefit of domestic violence and sexual assault services in Oklahoma that have been certified by the Attorney General. Your donation will be used to provide grants to domestic violence and sexual assault service providers for the purpose of providing domestic violence and sexual assault services in Oklahoma. The term "services" includes but is not limited to programs, shelters or a combination thereof.

13 - Support of Volunteer Fire Departments

You may donate from your tax refund for the benefit of volunteer fire departments in Oklahoma. Your donation will be used to provide grants to volunteer fire departments in this state for the purpose of purchasing bunker gear, wildland gear and other protective clothing.

14 - Oklahoma Lupus Revolving Fund

You may donate from your refund for the benefit of the Oklahoma Lupus Revolving Fund. Monies from the fund will be used by the State Department of Health to provide grants to the Oklahoma Medical Research Foundation for the purpose of funding research into treating and curing lupus in this state.

15 - Oklahoma Sports Eye Safety Program

You may donate from your refund for the benefit of the Oklahoma Sports Eye Safety Program. Your donation will be used by the State Department of Health to establish a sports eye safety grant program for the purchase and distribution of sports eye safety programs and materials to Oklahoma classrooms and sports eye safety protective wear to children age 18 and under. Monies will also be used to explore opportunities to utilize nonprofit organizations to provide such safety information or equipment.

DONATIONS FROM REFUND - CONTINUED

16 - Historic Greenwood District Music Festival Fund

With part of your tax refund you can support music festivals in the Historic Greenwood District of Tulsa. Your donation will be used by the Oklahoma Historical Society to assist with music education, public concerts, and a celebration of Tulsa's and Oklahoma's musical heritage.

17 - Public School Classroom Support Fund

Donations to the Public School Classroom Support Revolving Fund will be used by the State Board of Education to provide one or more grants annually to public school classroom teachers. Grants will be used by the classroom teacher for supplies, materials, or equipment for the class or classes taught by the teacher. Grant applications will be considered on a statewide competitive basis.

DIRECT DEPOSIT INFORMATION

All refunds, with limited exceptions*, must be directly deposited into a bank account.

Please complete the direct deposit box on the tax return to have the refund directly deposited into your account at a bank or other financial institution.

- 1** Check the appropriate box as to whether the refund will be going into a checking or savings account. Please keep in mind you will not receive notification of the deposit.
- 2** Fill out the routing number. The routing number must be nine digits. If the first two digits are not 01 through 12 or 21 through 32, the direct deposit will be rejected and a check will be issued instead. Using the sample check shown below, the routing number is **120120012**.
- 3** Enter your account number. The account number can be up to 17 characters (both numbers and letters). Include hyphens but omit spaces and special symbols. Enter the number from left to right and leave any unused boxes blank. On the sample check shown below, the account number is **2020268620**.

Please Note: The Oklahoma Tax Commission is not responsible if a financial institution refuses a direct deposit. If a direct deposit is refused, a check will be issued to the address shown on your tax return.

***EXCEPTION!** Due to electronic banking rules, the Oklahoma Tax Commission will not allow direct deposits to or through foreign financial institutions. If you use a foreign financial institution or have a foreign address on your income tax return, you will be issued a paper check. If you have an address with an APO, FPO or DPO you are not considered to have a foreign address; your refund will be direct deposited.

The image shows a sample check with the following details:

- Payee:** JOE SMITH, SUSIE SMITH, 123 Main Street, Anyplace, OK 00000
- Routing Number:** 120120012 (circled with a callout 'Routing Number')
- Account Number:** 2020268620 (circled with a callout 'Account Number')
- Amount:** \$ 1234 (with '1234' also in the top right corner)
- Bank:** ANYPLACE BANK, Anyplace, OK 00000
- Check Number:** 1234
- Check Number (MICR line):** @120120012| : 2020268620||

Note: The routing and account numbers may appear in different places on your check.