

# Full Year Resident - Short Form 2S - Individual Income Tax Return

**MONTANA**  
**2001**  
**Full Year**  
**Resident**  
**ONLY**  
**Filing from a**  
**Montana Address**

All Other Returns  
 and Refunds Mail to:  
 Dept. of Revenue  
 PO Box 6577  
 Helena, MT 59604-6577

Last Name		Your First Name & Middle Initial		<input type="checkbox"/> Deceased	Your Social Security No.	
Spouse's Last Name if Different		Spouse's First Name & Middle Initial			Spouse's Social Security No.	
Mailing Address (Montana Addresses Only)			City		Zip Code + 4	
					<b>MT 59</b>	
Filing Status Check One	1. Single <input type="checkbox"/>	2. Married filing joint return <input type="checkbox"/>	3. Head of Household (see Instructions) <input type="checkbox"/>	For Tax Due mail to: Dept. of Revenue PO Box 6308 Helena, MT 59604-6308		

**Exemptions** Regular 65 or Over Blind All filers are entitled to at least one exemption

1. Yourself .....  .....  .....  .....  ..... Enter number checked  1.

2. Spouse .....  .....  .....  ..... Enter number checked  2.

3. Dependents

Name Do Not Claim Yourself or Spouse	check if under age 1	If age one or over, dependents social security number	Relationship

3. Dependents .....  3.

4. Handicapped Dependent  
Attach Doctor's Certification  4.

5. Add lines 1, 2, 3 and 4 (if additional dependents, see instructions) **Total Number Exemptions**  5.

**File on or Before**  
**April 15, 2002**

April 2002						
1	2	3	4	5	6	
7	8	9	10	11	12	13
14	15	16	17	18	19	20
21	22	23	24	25	26	27
28	29	30				

6. Wages, salaries, tips, etc. .... Attach W-2 (s)	6.		<b>ROUND TO</b> <b>NEAREST DOLLAR</b> <b>If no entry leave blank</b>
7. Taxable interest income .... Attach Federal Schedule if over \$400	7.		
8. Dividend income .... Attach Federal Schedule if over \$400	8.		
9. Federal taxable pensions, IRA Distributions, annuities .... Attach 1099R's	9.		
10. Unemployment, alimony, state refund, etc, specify _____	10.		
11. Total of lines 6 thru 10 .....	11.		
12. Adjustments: moving expense, IRA, alimony, student loan interest, etc., specify _____	12.		
13. <b>Federal Adjusted Gross Income</b> (Subtract line 12 from line 11) .....	13.		
14. <b>Add</b> ● Interest on state & county municipal bonds (non-Montana) and/or federal refund (see instructions)	14.		
15. <b>Subtract</b> ● Exempt pension and annuity income - see Worksheet IV, page 13.....	15.		
16. ● Interest exclusion for elderly. ....	16.		
17. ● Interest exclusion for savings bonds, etc. (specify) _____	17.		
18. ● Unemployment .....	18.		
19. ● Other reductions (including tips, medical savings account, family education savings account, etc. specify) _____	19.		
20. Total adjustments decreasing income (add lines 15 thru 19) .....	20.		
21. Montana adjusted gross income (add lines 13 and 14, subtract line 20) .....	21.		
22. (A) Standard deduction - see Worksheet V, page 13 (A) <input type="checkbox"/> (B) Federal income taxes paid or withheld in 2001. (B) <input type="checkbox"/>	22.		
(B1) <b>Federal Advance Payment</b> -Subtract (B1) from (B). Enter amount on line 22(B1) <input type="checkbox"/>			
23. Multiply \$1,720 times the number of exemptions in Box 5 above .....	23.		
24. Add lines 22 and 23 .....	24.		
25. Taxable income. Subtract line 24 from 21 (If less than zero enter zero) .....	25.		
26. Tax on amount on line 25 from tax table on back of this form .....	26.		
27. In boxes below, enter any amount you and your spouse would like to contribute. See instructions.			
Nongame Wildlife Program <input type="checkbox"/> 28.  Child Abuse Prevention <input type="checkbox"/> 29.  Agriculture in MT Schools <input type="checkbox"/> 30. Enter total amounts in boxes.....	27.		
31. Total Tax — Add lines 26 and 27.....	31.		
32. Montana tax withheld..... Attach withholding statements W-2(s), 1099(s) etc.	32.		
33. Elderly Homeowner/ Renter Credit- Attach Form 2EC with your receipts.	33.		
34. Add lines 32 and 33.....	34.		
35. If line 34 is larger than line 31 enter difference (refunds of more than \$1.00 will be issued) .....	35.		
If you wish to use direct deposit enter your RTN# and ACCT# below. See instructions  Checking <input type="checkbox"/> Savings <input type="checkbox"/>			
RTN# <input type="text"/> ACCT# <input type="text"/>			
36. If line 31 is larger than line 34 enter difference .....	36.		
37. Penalties (see instructions for calculation of penalties)			
Under Pay Pen. <input type="text"/> Late File <input type="text"/> Late Pay <input type="text"/> Interest <input type="text"/> <b>Total of Boxes</b>	37.		
38. <b>TOTAL DUE</b> Add lines 36 & 37. Attach check or money order for full amount if \$1.00 or more.	38.		
Payable to the Department of Revenue. Include your payment with the payment coupon provided in this booklet.			

**REPORT YOUR INCOME**



**NEW**

**ATTACH WITHHOLDING STATEMENTS**

**SIGN YOUR RETURN**



Your Signature  Date  Telephone Number  Spouse Signature (if filing jointly, both must sign)  Date

I declare under penalty of false swearing that the information in this return and attachments is true, correct and complete.  
 Questions? Please call (406) 444-6900 or TDD (406) 444-2830 for hearing impaired.

If Taxable Income is:				<u>TAX TABLE</u>		If Taxable Income is:			
Over	But not over	Multiply by	and Subtract = Tax	Over	But not over	Multiply by	and Subtract = Tax		
\$ 0 .....	\$ 2,200 ...	X ... 2 % .....	\$ 0	\$17,200 ...	\$21,500 ...	X ..... 7 % .....	\$ 452		
\$ 2,200 .....	\$ 4,300 ...	X ... 3 % .....	\$ 22	\$21,500 ...	\$30,200 ...	X ..... 8 % .....	\$ 667		
\$ 4,300 .....	\$ 8,600 ...	X ... 4 % .....	\$ 65	\$30,200 ...	\$43,100 ...	X ..... 9 % .....	\$ 969		
\$ 8,600 .....	\$12,900 ...	X ... 5 % .....	\$ 151	\$43,100 ...	\$75,400 ...	X ..... 10 % .....	\$ 1,400		
\$12,900 .....	\$17,200 ...	X ... 6 % .....	\$ 280	\$75,400 .....	X ..... 11 % .....		\$ 2,154		

**Example = taxable income \$2,400 x 3% (.03) = \$72 subtract \$22 = \$50 tax**

## Standard Deduction Worksheet



1. Enter amount from line 21 of Form 2S . 1. \_\_\_\_\_
2. Enter 20% of line 1. 2. \_\_\_\_\_
3. Enter the amount from below that corresponds to your filing status:
 

Joint or head of household  
(filing status 2 or 3): \$6,460

Single (filing status 1): \$3,230

3. \_\_\_\_\_
4. Enter the amount from line 2 or line 3, whichever is smaller. 4. \_\_\_\_\_
5. Enter the amount from below that corresponds to your filing status:
 

Joint or head of household  
(filing status 2 or 3): \$2,860

Single (filing status 1) \$1,430

5. \_\_\_\_\_
6. Enter the amount from line 4 or line 5, whichever is larger. This is your standard deduction. Transfer this amount to line 22, Form 2S. 6. \_\_\_\_\_

Questions? Please call (406) 444-6900 or TDD (406) 444-2830 for hearing impaired.

