

2005

Montana Individual Income Tax Return – Short Form

Form 2S

Only full year residents may elect to use Form 2S

Montana

Amended Return, Your first name and initial, Last name, Deceased, Your social security number, Spouse's first name and initial, Last name, Deceased, Spouse's social security number, Home address (number and street), City, State, Zip+4, MT

Filing Status (check only one box) 1 Single 2 Married filing jointly 3 Head of Household

Exemptions 4a X Yourself, 65 or older, Blind, Enter number checked, 4a, 4b Spouse, 65 or older, Blind, Enter number checked, 4b, 4c Dependent's First Name, Last Name, SSN, Relationship, Disability, Enter the total of line 4c, 4c, 4d If additional dependents, see instructions. Add lines 4a thru 4c and enter total exemptions here. 4d

Enter amounts corresponding to your federal return. Round to nearest dollar. If no entry, leave blank.

5 Enter wages, salaries, tips, etc. Attach federal Form(s) W-2. 5, 6 Enter taxable interest. Attach federal Schedule B if required. 6, 7 Enter ordinary dividends. Attach federal Schedule B if required. 7, 8 Enter taxable pension, IRA distributions, and annuities. Attach federal Form(s) 1099R. 8, 9 Enter unemployment, alimony, state refund, etc. Specify: 9, 10 Add and enter amounts in the far right column for lines 5 through 9. This is your total income. 10, 11 Adjustments: Moving expense, IRA, alimony, student loan interest, etc. Specify: 11, 12 Subtract line 11 from line 10. This is your federal adjusted gross income. 12, 13 Additions: Enter interest and dividends from other state, county, or municipal bonds, and federal refund. 13, 14a Enter partial pension and annuity income exemption from Form W, Worksheet IV, line 6. 14a, 14b Enter partial interest exemption for taxpayers 65 and older. 14b, 14c Enter exempt interest and mutual fund dividends from federal bonds, notes, and obligations. 14c, 14d Enter exempt unemployment compensation. 14d, 14e Enter other exclusions. Certain taxed tips and gratuities, etc. 14e, 14 Add lines 14a through 14e and enter result here. This is your total subtractions. 14, 15 Add lines 12 and 13 then subtract line 14. This is your Montana adjusted gross income. 15

16 Enter your standard deduction from Form W, Worksheet V or the worksheet on the back of this form. 16, 17 Multiply \$1,900 by the number of exemptions on line 4d and enter result here. 17, 18 Subtract the total of lines 16 and 17 from line 15 and enter here, but not less than zero. This is your taxable income. 18, 19 Enter your tax from the tax table. If line 18 is less than zero, enter zero. This is your total tax due. 19, 20 Enter your Montana income tax withheld. Attach federal Form(s) W-2 and 1099. 20, 21 Enter your refundable elderly/homeowner renter credit from Form 2EC. 21, 22 Add lines 20 and 21. This is your total payments and offsets. 22

23 Interest on underpayment, Late file penalty, Late pay penalty, Interest, Enter the sum of 23a thru 23d here. 23, 24 Nongame wildlife program, Child abuse prevention, Agriculture in Schools, Check-off Total. 24, 25 Add lines 19, 23 and 24 and enter result here. This is the sum of your tax, penalty, interest and contributions. 25, 26 If line 25 is more than line 22, enter the difference here. This is the amount you owe. Make check payable to MONTANA DEPARTMENT OF REVENUE or visit our website at www.mt.gov/revenue to pay by credit card or E-Check. 26, 27 If line 25 is less than line 22, enter the difference here. This is your refund. If you wish to use direct deposit, enter your RTN# and ACCT# below. RTN#, ACCT#, checking, savings 27

Check the box here if you do need forms and instructions mailed to you next year. Name, address and telephone number of paid preparer. Extension-Check this box and attach a copy of your federal Form 4868 to receive your Montana extension. SSN or FEIN:

May the DOR discuss this return with your tax preparer? Yes No Questions? Call (406) 444-6900 or TDD (406) 444-2830 for hearing impaired.

Your signature is required Date Daytime telephone number Spouse's signature Date I declare under penalty of false swearing that the information in this return and attachments is true, correct and complete.

| Amended Return Reconciliation | | Round to the nearest dollar |
|---|--|-----------------------------|
| (Use this reconciliation only when you are completing an amended return.) | | |
| 1 | Enter your amended liability (line 26) or your amended refund (line 27) here. | 1 |
| 2 | Enter your total 2005 refund previously received here. | 2 |
| 3 | Enter your total 2005 payments previously made which are not included in line 22 here. | 3 |
| 4 | Add lines 1 and 2, and then subtract line 3. This is your amended return underpayment or overpayment. | 4 |
| Describe your amended adjustments here. Add additional pages if necessary. | | |
| | | |
| | | |

2005 Montana Individual Income Tax Table

| If Taxable Income is Over | But not Over | Multiply by | and | Subtract | = Tax | If Taxable Income is Over | But not Over | Multiply by | and | Subtract | = Tax |
|------------------------------|-----------------|-------------|-----|----------|-------|------------------------------|-----------------|-------------|-----|----------|-------|
| \$ 0 | \$ 2,300 | X 1% | | \$ 0 | | \$ 8,400 | \$ 10,800 | X 5% | | \$ 210 | |
| \$ 2,300 | \$ 4,100 | X 2% | | \$ 23 | | \$ 10,800 | \$ 13,900 | X 6% | | \$ 318 | |
| \$ 4,100 | \$ 6,200 | X 3% | | \$ 64 | | \$ 13,900 | | X 6.9% | | \$ 443 | |
| \$ 6,200 | \$ 8,400 | X 4% | | \$ 126 | | | | | | | |

Example: taxable income \$4000 x .02 (2%) = \$80; subtract \$23 = \$57 tax

| Standard Deduction Worksheet For Form 2S | | Calculation of Your Standard Deduction |
|---|---|--|
| 1 | Enter your Montana adjusted gross income from Form 2S, line 15 here. | 1 |
| 2 | Multiply the amount on line 1 by .20 (20%) and enter the result here. | 2 |
| 3 | Enter here the amount below that corresponds to your filing status that you claimed on your Form 2S. | 3 |
| | <ul style="list-style-type: none"> • If your filing status is single (filing status 1) enter \$3,560. This is your maximum standard deduction. • If your filing status is joint or head of household (filing status 2 or 3) enter \$7,120. This is your maximum standard deduction. | |
| 4 | Enter here the amount from line 2 or 3, whichever is smaller. | 4 |
| 5 | Enter here the amount below that corresponds to your filing status that you claimed on your Form 2S. | 5 |
| | <ul style="list-style-type: none"> • If your filing status is single (filing status 1) enter \$1,580. This is your minimum standard deduction. • If your filing status is joint or head of household (filing status 2 or 3) enter \$3,160. This is your minimum standard deduction. | |
| 6 | Enter here and on Form 2S, line 16 the amount from line 4 or 5, whichever is larger. This is your standard deduction. | 6 |