



OKLAHOMA RESIDENT INCOME TAX RETURN

Your Social Security Number Place an 'X' in this box if this taxpayer is deceased →

Spouse's Social Security Number (joint return only) Place an 'X' in this box if this taxpayer is deceased →

AMENDED RETURN! Place an 'X' in this box if this is an amended 511. See Schedule 511-H. →

NAME AND ADDRESS PLEASE PRINT OR TYPE

Your first name, middle initial and last name

If a joint return, spouse's first name, middle initial and last name

Mailing address (number and street, including apartment number, rural route or PO Box)

City, State and ZIP

FILING STATUS

1 Single

2 Married filing joint return (even if only one had income)

3 Married filing separate
 • If spouse is also filing, list name and SSN in the boxes: Name: SSN:

4 Head of household with qualifying person

5 Qualifying widow(er) with dependent child
 • Please list the year spouse died in box at right:

AGE 65 OR OVER? (Please see instructions) Yourself Spouse

NOT REQUIRED TO FILE

Place an 'X' in this box if you do not have sufficient gross income to require you to file a Federal return. (see instructions)

EXEMPTIONS

* NOTE: If claiming Special Exemption, see instructions on page 7 of 511 Packet.

	REGULAR	*SPECIAL	BLIND
YOURSELF	<input type="text"/>	<input type="text"/>	<input type="text"/>
SPOUSE	<input type="text"/>	<input type="text"/>	<input type="text"/>
NUMBER OF DEPENDENT CHILDREN <input type="text"/>			
NUMBER OF OTHER DEPENDENTS <input type="text"/>			

ADD THE TOTALS FROM THE 4 BOXES. WRITE THE TOTAL IN THE BOX BELOW.

TOTAL

NOTE: IF YOU MAY BE CLAIMED AS A DEPENDENT ON ANOTHER RETURN, ENTER "0" FOR YOUR REGULAR EXEMPTION.

PART ONE: TO ARRIVE AT OKLAHOMA ADJUSTED GROSS INCOME

		Round to Nearest Whole Dollar
1	Federal adjusted gross income (from Federal 1040, 1040A, or 1040EZ)	<input type="text"/> 00
2	Oklahoma Subtractions (provide Schedule 511-A)	<input type="text"/> 00
3	Line 1 minus line 2	<input type="text"/> 00
4	Out-of-state income, except wages. Describe (4a) (Provide Federal schedule with detailed description; see instructions) 4b	<input type="text"/> 00
5	Line 3 minus line 4b	<input type="text"/> 00
6	Oklahoma Additions (provide Schedule 511-B)	<input type="text"/> 00
7	Oklahoma adjusted gross income (line 5 plus line 6)	<input type="text"/> 00

PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS

8	Oklahoma Adjustments (provide Schedule 511-C)	<input type="text"/> 00
9	Oklahoma income after adjustments (line 7 minus line 8)	<input type="text"/> 00
STOP AND READ: If line 4b is zero, complete lines 10-11. If line 4b is more than zero, see Schedule 511-D and do not complete lines 10-11.		
10A	Federal itemized deductions from Federal Schedule A, line 29 10A <input type="text"/> 00 (If you did not itemize, skip lines 10A and 10B; enter the Oklahoma standard deduction on line 10C)	
10B	State and local sales or income taxes included in line 10A 10B <input type="text"/> 00	
10C	Oklahoma itemized deductions (line 10A minus line 10B) or Oklahoma standard deduction	
11	Exemptions (\$1,000 x total number of exemptions claimed above)	<input type="text"/> 00
12	Total deductions and exemptions (add lines 10C and 11 or amount from Sch. 511-D, line 5)	<input type="text"/> 00
13	Oklahoma Taxable Income (line 9 minus line 12)	<input type="text"/> 00
14	Oklahoma Income Tax from Tax Table (see pages 21-31 of instructions) If using Farm Income Averaging, enter tax from Form 573, line 22 and enter a "1" in box. If paying the Health Savings Account additional 10% tax, add additional tax here and enter a "2" in box. <input type="checkbox"/>	<input type="text"/> 00
STOP AND READ: If line 7 is equal to or larger than line 1, complete lines 15 and 16. If line 7 is smaller than line 1, complete Schedules 511-E and 511-F.		
15	Oklahoma child care/child tax credit (see instructions)	<input type="text"/> 00
16	Oklahoma earned income credit (see instructions)	<input type="text"/> 00
17	Credit for taxes paid to another state (provide Form 511TX)	<input type="text"/> 00
18	Form 511CR - Other Credits Form. List 511CR line number claimed here: <input type="text"/>	<input type="text"/> 00
19	Income Tax (line 14 minus lines 15-18) Do not enter less than zero	<input type="text"/> 00
DO NOT PAY THIS AMOUNT. PAYMENT IS FIGURED ON LINE 42.		

Oklahoma Standard Deduction:

- Single or Married Filing Separate: \$6,300
- Married Filing Joint or Qualifying Widow(er): \$12,600
- Head of Household: \$9,300

Itemized Deductions:
Provide copy of the Federal Schedule A.



Name(s) shown on Form 511: _____

Your Social Security Number: _____

PART THREE: TAX, CREDITS AND PAYMENTS

20	Total from line 19	20	00
21	Use tax due on Internet, mail order, or other out-of-state purchases	21	00
(For use tax table, see page 11 of the Packet) If you certify that no use tax is due, place an 'X' here: <input type="checkbox"/>			
22	Balance (add lines 20 and 21)	22	00
23	Oklahoma withholding (provide all W-2s, 1099s or other withholding statements) ..	23	00
24	2016 estimated tax payments (qualified farmer <input type="checkbox"/>)	24	00
25	2016 payment with extension	25	00
26	Low Income Property Tax Credit (provide Form 538-H)	26	00
27	Sales Tax Relief Credit (provide Form 538-S)	27	00
28	Natural Disaster Tax Credit (provide Form 576)	28	00
29	Credits from Form.....a) <input type="checkbox"/> 577 b) <input type="checkbox"/> 578	29	00
30	Amount paid with original return plus additional paid after it was filed (amended return only)	30	00
31	Payments and credits (add lines 23-30)	31	00
32	Overpayment, if any, as shown on original return and/or prior amended return(s) or as previously adjusted by Oklahoma (amended return only)	32	00
33	Total payments and credits (line 31 minus 32).....	33	00

PART FOUR: REFUND

For further information regarding estimated tax, see page 5 of the 511 Packet.	34	If line 33 is more than line 22, subtract line 22 from line 33. This is your overpayment ..	34	00
	35	Amount of line 34 to be applied to 2017 estimated tax (original return only)	35	00
Schedule 511-G provides you with the opportunity to make a financial gift from your refund to a variety of Oklahoma organizations. Please place the line number of the organization from Schedule 511-G in the box below. If you give to more than one organization, put a "99" in the box. Provide Schedule 511-G. <input type="checkbox"/>				
	36	Donations from your refund (total from Schedule 511-G) ..	36	00
	37	Total deductions from refund (add lines 35 and 36)	37	00
	38	Amount to be refunded to you (line 34 minus line 37).....	38	00

Direct Deposit Note: Verify your account and routing numbers are correct. If your direct deposit fails to process or you do not choose direct deposit, you will receive a debit card. See the 511 Packet for direct deposit and debit card information.

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: _____

PART FIVE: AMOUNT YOU OWE

If you have an underpayment of estimated tax (line 40) & overpayment (line 34), see instructions.	39	If line 22 is more than line 33, subtract line 33 from line 22. This is your tax due	39	00
	40	Underpayment of estimated tax interest (annualized installment method <input type="checkbox"/>) ..	40	00
	41	For delinquent payment add penalty of 5% \$ _____ plus interest of 1.25% per month..... \$ _____	41	00
	42	Total tax, donation, penalty and interest (add lines 39-41)	42	00

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

Place an 'X' in this box if the Oklahoma Tax Commission may discuss this return with your tax preparer.....

Taxpayer's signature _____ Date _____	Spouse's signature _____ Date _____	Paid Preparer's signature _____ Date _____
Taxpayer's occupation _____	Spouse's occupation _____	Paid Preparer's address and phone number _____
Daytime Phone (optional) _____	Daytime Phone (optional) _____	Paid Preparer's PTIN _____

NOTE: Provide this page ONLY if you have an amount shown on a schedule.



Name(s) shown on Form 511:

Your Social Security Number:

SCHEDULE 511-A **Oklahoma Subtractions** See instructions for details on qualifications and required documents.

1	Interest on U.S. government obligations	1	<input type="text"/>	00
2	Social Security benefits taxed on your Federal Form 1040 or 1040A	2	<input type="text"/>	00
3	Federal civil service retirement in lieu of social security	3	<input type="text"/>	00
	└ Retirement Claim Number: Taxpayer <input type="text"/> Spouse <input type="text"/>			
4	Military Retirement (see instructions for limitation)	4	<input type="text"/>	00
5	Oklahoma government or Federal civil service retirement (see instructions for limitation) ...	5	<input type="text"/>	00
6	Other retirement income (see instructions for limitation)	6	<input type="text"/>	00
7	U.S. Railroad Retirement Board benefits	7	<input type="text"/>	00
8	Oklahoma depletion	8	<input type="text"/>	00
9	Oklahoma net operating loss	Loss Year(s) <input type="text"/>	<input type="text"/>	00
10	Exempt tribal income	10	<input type="text"/>	00
11	Gains from the sale of exempt government obligations	11	<input type="text"/>	00
12	Oklahoma Capital Gain Deduction (provide Form 561)	12	<input type="text"/>	00
13	Miscellaneous: Other subtractions (enter number in box for type of deduction) . <input type="text"/>	13	<input type="text"/>	00
14	Total subtractions (add lines 1-13, enter total here and on line 2 of Form 511)	14	<input type="text"/>	00

SCHEDULE 511-B **Oklahoma Additions** See instructions for details on qualifications and required documents.

1	State and municipal bond interest	1	<input type="text"/>	00
2	Out-of-state losses (describe _____) Enter as a positive number .	2	<input type="text"/>	00
3	Lump sum distributions (not included in your Federal Adjusted Gross Income)	3	<input type="text"/>	00
4	Federal net operating loss - Enter as a positive number	4	<input type="text"/>	00
5	Recapture of depletion claimed on a lease bonus or add back of excess Federal depletion	5	<input type="text"/>	00
6	Recapture of Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) ..	6	<input type="text"/>	00
7	Miscellaneous: Other additions (enter number in box for type of addition)	7	<input type="text"/>	00
8	Total additions (add lines 1-7, enter total here and on line 6 of Form 511)	8	<input type="text"/>	00

SCHEDULE 511-C **Oklahoma Adjustments** See instructions for details on qualifications and required documents.

1	Military pay exclusion - Active Duty, Reserve and National Guard (not retirement income) ...	1	<input type="text"/>	00
2	Qualifying disability deduction	2	<input type="text"/>	00
3	Qualified adoption expense	3	<input type="text"/>	00
4	Contributions to Oklahoma 529 College Savings Plan and OklahomaDream 529 Account(s) ..	4	<input type="text"/>	00
5	Deduction for providing foster care	5	<input type="text"/>	00
6	Miscellaneous: Other adjustments (enter number in box for type of deduction) <input type="text"/>	6	<input type="text"/>	00
7	Total adjustments (add lines 1-6, enter total here and on line 8 of Form 511)	7	<input type="text"/>	00

NOTE: Provide this page **ONLY** if you have an amount shown on a schedule.



Name(s) shown on Form 511:

Your Social Security Number:

SCHEDULE 511-D Deductions and Exemptions See instructions for details on qualifications and required documents.

Use this schedule if you have income from out-of-state (Form 511, line 4). Your exemptions and deductions must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income reduced by allowable adjustments except out-of-state income. If you do not have out-of-state income on Form 511, line 4, do not use this schedule. Instead complete Form 511, lines 10-11.

1A	Federal itemized deductions from Federal Schedule A, line 29 1A	<input type="text"/>	00	
	(If you did not itemize, skip lines 1A and 1B; enter the Oklahoma standard deduction on line 1C)			
1B	State and local sales or income taxes included in line 1A 1B	<input type="text"/>	00	
1C	Oklahoma itemized deductions (line 1A minus line 1B) or Oklahoma standard deduction 1c		00	
2	Exemptions (\$1,000 x number of exemptions claimed at top of Form 511) 2		00	
3	Total (add lines 1C and 2) 3		00	
4	Divide the amount on line 7 of Form 511 by the amount on line 3 of Form 511	<input type="text"/>	÷	<input type="text"/>
	Enter the percentage from the above calculation here (do not enter more than 100%) 4			%
5	Total allowable deductions and exemptions (multiply line 3 by percentage on line 4, enter total here and on line 12 of Form 511) (Leave lines 10 - 11 of Form 511 blank) 5			00

SCHEDULE 511-E Child Care/Child Tax Credit See instructions for details on qualifications and required documents.

If your Federal Adjusted Gross Income is \$100,000 or less and you are allowed either a credit for child care expenses or the child tax credit on your Federal return, you are allowed a credit against your Oklahoma tax. Your Oklahoma credit is the **greater** of:

- 20% of the credit for child care expenses allowed by the IRS Code.
Your allowed Federal credit cannot exceed the amount of your Federal tax reported on your Federal return.
- or**
- 5% of the child tax credit allowed by the IRS Code.
This includes both the nonrefundable child tax credit and the refundable additional child tax credit.

The credit must be prorated based on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income.

If your Federal Adjusted Gross Income is greater than \$100,000, no credit is allowed.

Provide a copy of your Federal return and, if applicable, the Federal child care credit schedule.

1	Enter your Federal child care credit 1	<input type="text"/>	00	
2	Multiply line 1 by 20% 2		00	
3	Enter your Federal child tax credit (total of child tax credit & additional child tax credit) 3	<input type="text"/>	00	
4	Multiply line 3 by 5% 4		00	
5	Enter the larger of line 2 or line 4 5			00
6	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511	<input type="text"/>	÷	<input type="text"/>
	Enter the percentage from the above calculation here (do not enter more than 100%) 6			%
7	Multiply line 5 by line 6. This is your Oklahoma child care/child tax credit. Enter total here and on line 15 of Form 511 7			00

SCHEDULE 511-F Earned Income Credit See instructions for details on qualifications and required documents.

You are allowed a credit equal to 5% of the Earned Income Credit allowed on your Federal return. The credit must be prorated on the ratio of Oklahoma Adjusted Gross Income to Federal Adjusted Gross Income. Provide a copy of your Federal return.

1	Federal earned income credit 1	<input type="text"/>	00	
2	Multiply line 1 by 5% 2		00	
3	Divide the amount on line 7 of Form 511 by the amount on line 1 of Form 511	<input type="text"/>	÷	<input type="text"/>
	Enter the percentage from the above calculation here (do not enter more than 100%) 3			%
4	Oklahoma earned income credit 4 (multiply line 2 by line 3, enter total here and on line 16 of Form 511)			00

Information for Schedule 511-G**1- Support for 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. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma CASA Association, Inc., P.O. Box 54946, Oklahoma City, OK 73154.

2- 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. If you are not receiving a refund, you may still donate. Please mail your contribution to: Operation Homefront Task Force, 3501 Military Circle, Oklahoma City, OK 73111-4398.

3- Support of Programs for Regional Food Banks in 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. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma Department of Human Services, Revenue Processing Unit, Re: Programs for OK Food Banks, P.O. Box 248893, Oklahoma City, OK 73124.

4- 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. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma State Department of Education, Y.M.C.A. Youth and Government Program, Office of the Comptroller, 2500 North Lincoln Boulevard, Room 415, Oklahoma City, OK 73105-4599.