

2015

CITY OF DULUTH

Treasury Division, Room 105, City Hall, Duluth MN 55802
(218-)730-5350

2015 Sales Tax Refund

For Persons 65 Years of Age or Older



See Reverse Side for Instructions

PLEASE PRINT

FILE BY APRIL 30, 2015: REFUND PERIOD IS MAY 1ST TO 15TH

COMPLETE ALL ITEMS

Last Name, First Name & Middle Initial, Social Security Number, Date of Birth (Month, Day, Year, Age)

Filing Status (Single, Married), Spouse's First Name & Initial, Spouse's Social Security Number, Spouse's Date of Birth (Month, Day, Year, Age)

Street Address, Apartment No., City/State/Zip (Duluth, MN 558...)

Have you lived continuously in Duluth during the year? (Yes, No), Phone Number (() - -)

All Income section with numbered list (1-7) and a table for recording amounts.

CHECK THIS BOX IF YOU WANT THE SALES TAX DIVISION TO COMPUTE YOUR REFUND. SIGN AND RETURN THIS FORM.

If you calculated your refund, please check the method used below: Method I (Multiply income on Line 7 by 0.0022), Method II (Actual amount of tax paid). Amount of refund: \$

I hereby declare that I have examined the information contained in this application, and that said information is true and correct to the best of my knowledge and belief. I understand that willful use by me of false statements herein may cause me to be subjected to criminal prosecution or fraud.

Your Signature

Date

Spouse's Signature (if Married)

Date

Preparer's Name (Print or Type)

Preparer's Signature & Date

DO NOT WRITE BELOW THIS LINE

Return checked by: _____

Approved by: _____

INSTRUCTIONS

Who May Apply:

1. You must have attained the age of 65 or over by December 31, of last year, ***and***
2. You must have resided within the city limits of Duluth during the ***entire*** calendar year, ***and***
3.
 - a. If you are single, your annual income on Line 7 cannot exceed **\$17,116.00**, or
 - b. If you are married filing jointly, your annual income on Line 7 cannot exceed **\$22,832.00**, or
 - c. If you are married but only one of you is 65 or older, that person may file as single. The single filer annual income on Line 7 cannot exceed **\$17,116.00** ***and*** your household income with your spouse under age 65 **must not exceed \$22,832.00**.

Income Defined:

Income shall be the adjusted gross income as reported on your Federal Income Tax Return, if filed, ***plus*** amounts from all other sources. This shall include **Social Security**, Railroad Retirement, Veteran's Disability Pensions, Private Pensions, Wages, Interest, Dividends, Public Assistance, State & City refunds (including last year's sales tax refund), Emergency Assistance, Rent Credits, etc. This pertains to income received in the previous calendar year.

Refund Calculation:

There are two methods by which you can claim a refund. The majority will work out best under Method I. If you have made a major purchase such as an automobile, Method II will probably be best.

Method I. If you do not maintain records of actual purchases:

Multiply the income on **Line 7** by **0.0022**

Method II. If you do maintain suitable records of purchases:

Claimants must substantiate the amount of City of Duluth Sales or Use Tax they paid during the last year. These records should be receipts or invoices which show the amount of tax paid. After these records have been examined by the Sales Tax Division, the amount substantiated will be refunded.

When to Apply:

Any time between January 1 and April 30, following the year for which the refund is filed. No applications for this refund will be accepted after April 30.

How to Apply:

- 1) Complete the application.
- 2) Sign the application.
- 3) Mail or deliver to:

City of Duluth Treasury Division
411 W 1st Street, Room 105
Duluth, MN 55802

Please contact us if you have any questions:

Telephone: (218)-730-5350 | Fax: (218)-730-5917

Office Hours: Monday through Friday, 8:00 AM through 4:30 PM