# 2024

See Reverse Side for Instructions

Return checked by:

# **CITY OF DULUTH**

Treasury Division, Room 120, City Hall, Duluth MN 55802

For Persons 65 Years of Age or Older FILE BY APRIL 30, 2025 REFUND PERIOD IS MAY 1ST TO 15TH



East Name   First Name & Middle Initial   Social Security Number   Month   Day   Year   Age	PLEASE PRINT	FILE BY APRIL 30, 2025 REFUND PERIOD IS MAY 1ST TO 15TH			COMPLETE ALL ITEMS			
Filing Status   Spouse's First Name & Initial   Spouse's Social Security Number   Spouse's Date of Birth   Month   Day   Year   Age	Last Name	First Name & Middle Initial	Social Security Number	Date of	Birth			
Married   Single   Street Address   Apartment No.   City/State/Zip   Duluth, MN 558   Dul				Month	Day	Year	Age	
Married   Single   Street Address   Apartment No.   City/State/Zip   Duluth, MN 558   Dul								
Street Address  Apartment No. City/State/Zip Duluth, MN 558  Have you lived continuously in Duluth during the year? Yes No List below all income received during the year, including spouse's income if filing status is married.  All Income  1. Federal Annual Adjusted Gross Income (if filed) 2. Social Security (include Medicare) 3. Pension: Veteran's, Private, RR, PERA, MSRS, etc. 4. Interest and Dividends on Savings or Investments 5. Public Assistance, Supplemental Income 6. Other Income (Refunds, etc. see back for list) 7. Total Annual Income (Add lines 1-6)  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 II: Actual amount of tax paid (enclose records to verify amount claimed)  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  Preparer's Name (Print or Type)  Preparer's Signature & Date	Filing Status	Spouse's First Name & Initial	Spouse's Social Security Number	Spouse'	Spouse's Date of Birth			
Street Address  Apartment No.   City/State/Zip   Duluth, MN 558   Phone Number	Married			Month	Day	Year	Age	
Have you lived continuously in Duluth during the year?	Single							
Have you lived continuously in Duluth during the year?	Street Address		Apartment No	. City/Sta	City/State/Zip			
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Approved by:

## **INSTRUCTIONS**

## Who May Apply:

- 1. You must have attained the age of 65 or over by December 31st of 2024 and
- 2. You must have resided within the City limits of Duluth during the *entire* calendar year, *and*
- 3. You must meet income eligibility requirements
  - a) Single Filers: Annual income as reflected on Line 7 cannot exceed \$22,382.26
  - b) Married, Filing Jointly: Annual income as reflected on Line 7 cannot exceed \$29,856.97
  - c) If you are married but only one of you is 65 or older: The person 65 or older may file as single. The single filer annual income cannot exceed \$22,382.26 and your household income with your spouse under age 65 must not exceed \$29,856.97

## Income Defined

Income shall be the adjusted gross income as reported on your Federal Income Tax Return, if filed, <u>plus</u> amounts from all other sources. This shall include <u>Social Security</u>, Railroad Retirement, Veteran's Disability Pensions, Private Pensions, Wages, Interest, Dividends, Cash Public Assistance, State and City refunds (including last year's sales tax refund), Emergency Assistance, Rent Credits, etc...... This pertains to income received in the previous 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 had a major purchase in the past year, such as an appliance or furniture, Method II will probably be best.

- ➤ Method I: If you do not maintain records of actual purchases Multiply the Income on Line 7 by .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 have 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 Sale Tax Division, the amount substantiated will be refunded.

## When to Apply

You may apply for refund between the dates of January 1<sup>st</sup> and April 30<sup>th</sup> following the year for which the refund is filed. No applications for this refund will be accepted after April 30<sup>th</sup>.

How to Apply:

1) Complete the Application 2) Sign the Application 3) Mail or Deliver to:

City of Duluth Treasury Division 411 West 1<sup>st</sup> Street, Room 120 Duluth MN 55802-1187

Please contact us if you have any questions.