

2018 Oklahoma Tax-Aide Information Sheet

Taxpayer Name: _____ **Date:** _____

1. Did you (and your spouse, if applicable) live in Oklahoma **ALL** of last year? Yes No
2. If part year resident, dates taxpayer lived in Oklahoma _____
3. Did you make any Estimated Tax Payments to the Oklahoma Tax Commission? . . . Yes No
 - a. **If Yes**, enter total of Estimated Tax Payments . . . \$ _____
4. What is your Oklahoma source income? \$ _____
5. What is your Federal Adjusted Income (AGI) \$ _____

RETIREMENT INCOME

Enter the **TOTAL** amount of the following retirement income types received WHILE A RESIDENT OF OKLAHOMA for the taxpayer and/or spouse:

<u>Type</u>	<u>Federal Total</u>	<u>Taxpayer</u>	<u>Spouse</u>
Civil Service retirement	_____	_____	_____
Civil Service Claim Number		_____	_____
Military retirement	_____	_____	_____
OKLAHOMA government (State or local) or Federal retirement	_____	_____	_____
All other retirement	_____	_____	_____

6. Enter following Oklahoma Subtractions
 - a. Interest on U.S government Obligations.....\$ _____
 - b. Taxable Social Security Benefits.....\$ _____
 - c. Income from Oklahoma gas and oil well production minus any expenses and taxes.....\$ _____
 - d. Exempt Tribal Income\$ _____
 - e. Out of state income from real or personal property \$ _____
 - f. Oklahoma capital gain \$ _____
7. Enter Oklahoma Adjustments
 - a. Non-Oklahoma state and municipal bond interest
 - b. Lump sum distributions (not included in your Federal AGI).....
 - c. Federal net operating loss.....
 - d. Recapture depletion claimed on a lease bonus or add back of excess Federal depletion.

e. Recapture of contributions to Oklahoma 529 College

f. Savings Plan and Oklahoma Dream 529 Account(s)...

8. Did you contribute to a Oklahoma 529 Plan Yes \$_____ No

9. Did you buy anything outside of Oklahoma or from the internet while you lived in Oklahoma for which no sales tax was charged? Yes \$_____ No