

# 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:

**\* NOTE:** If claiming Special Exemption, see instructions on page 6 of 511 Packet.

	REGULAR	*SPECIAL	BLIND	
<b>EXEMPTIONS</b>	YOURSELF	+	+	=
	SPOUSE	+	+	=
NUMBER OF DEPENDENT CHILDREN				=
NUMBER OF OTHER DEPENDENTS				=

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.

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

## 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) .....	00
2	Oklahoma Subtractions (provide Schedule 511-A).....	00
3	Line 1 minus line 2.....	00
4	Out-of-state income, except wages. Describe (4a) (Provide Federal schedule with detailed description; see instructions) .....	00
5	Line 3 minus line 4b.....	00
6	Oklahoma Additions (provide Schedule 511-B).....	00
7	<b>Oklahoma adjusted gross income</b> (line 5 plus line 6)..... (If line 7 is different than line 1, provide a copy of your Federal return.)	00

## PART TWO: OKLAHOMA TAXABLE INCOME, TAX AND CREDITS

8	Oklahoma Adjustments (provide Schedule 511-C).....	00
9	Oklahoma income after adjustments (line 7 minus line 8).....	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 (Provide copy of the Federal Schedule A.) (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 (Single or Married Filing Separate: \$6,350 • Married Filing Joint or Qualifying Widow(er): \$12,700 • Head of Household: \$9,350)..... 10c	00
11	Exemptions (\$1,000 x total number of exemptions claimed above).....	00
12	Total deductions and exemptions (add lines 10C and 11 or amount from Sch. 511-D, line 5) .....	00
13	<b>Oklahoma Taxable Income</b> (line 9 minus line 12) .....	00
14	Oklahoma Income Tax from Tax Table (see pages 20-31 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. If recapturing the Oklahoma Affordable Housing Tax Credit, add recaptured credit here and enter a "3" in box.... <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) .....	00
16	Oklahoma earned income credit (see instructions) .....	00
17	Credit for taxes paid to another state (provide Form 511TX) .....	00
18	Form 511CR - Other Credits Form. List 511CR line number claimed here: <input type="text"/> .....	00
19	<b>Income Tax</b> (line 14 minus lines 15-18) <b>Do not enter less than zero</b> .....	00

**DO NOT PAY THIS AMOUNT. PAYMENT IS FIGURED ON LINE 43.**

2017 Form 511 - Resident Income Tax Return - Page 2

Name(s) shown on Form 511:

Your Social Security Number:

PART THREE: TAX, CREDITS AND PAYMENTS

Table with 3 columns: Line number, Description, and Amount. Includes lines 20-33 for tax, credits, and payments.

PART FOUR: REFUND

Table with 3 columns: Line number, Description, and Amount. Includes lines 34-38 for refund calculations.

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.

Form for direct deposit information: Is this refund going to or through an account that is located outside of the United States? Deposit my refund in my: checking account, savings account. Includes routing and account number fields.

PART FIVE: AMOUNT YOU OWE

Table with 3 columns: Line number, Description, and Amount. Includes lines 39-43 for tax due, donation, and penalties.

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.

Signature and contact information section for taxpayer, spouse, and paid preparer.

2017 Form 511 - Resident Income Tax Return - Page 3

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.

Table with 15 rows for subtractions: Interest on U.S. government obligations, Social Security benefits, Federal civil service retirement, Military Retirement, Oklahoma government or Federal civil service retirement, Other retirement income, U.S. Railroad Retirement Board benefits, Oklahoma depletion, Oklahoma net operating loss, Exempt tribal income, Gains from the sale of exempt government obligations, Oklahoma Capital Gain Deduction, Income Tax Refund, Miscellaneous: Other subtractions, Total subtractions.

SCHEDULE 511-B

Oklahoma Additions

See instructions for details on qualifications and required documents.

Table with 8 rows for additions: State and municipal bond interest, Out-of-state losses, Lump sum distributions, Federal net operating loss, Recapture of depletion, Recapture of Contributions to Oklahoma 529 College Savings Plan, Miscellaneous: Other additions, Total additions.

SCHEDULE 511-C

Oklahoma Adjustments

See instructions for details on qualifications and required documents.

Table with 7 rows for adjustments: Military pay exclusion, Qualifying disability deduction, Qualified adoption expense, Contributions to Oklahoma 529 College Savings Plan, Deduction for providing foster care, Miscellaneous: Other adjustments, Total adjustments.

## 2017 Form 511 - Resident Income Tax Return - Page 4

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	<b>Total allowable deductions and exemptions</b> (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 <b>care</b> credit ..... 1	<input type="text"/>	00	
2	Multiply line 1 by 20% ..... 2	<input type="text"/>	00	
3	Enter your Federal child <b>tax</b> credit (total of child tax credit & additional child tax credit) ..... 3	<input type="text"/>	00	
4	Multiply line 3 by 5% ..... 4	<input type="text"/>	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	<input type="text"/>	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

2017 Form 511 - Resident Income Tax Return - Page 5

NOTE: Provide this page ONLY if you have an amount shown on a schedule or are filing an amended return.

Name(s) shown on Form 511:

Your Social Security Number:

SCHEDULE 511-G

Donations from Refund (Original return only)

This schedule allows you to make a donation from your refund to a variety of Oklahoma organizations. Information regarding each program, its mission, how funds are utilized, and mailing addresses are shown in Schedule 511-G Information. If you are not receiving a refund, but would like to make a donation to one of these organizations, Schedule 511-G Information lists the mailing address to mail your donation to the organization. If you are not receiving a refund and wish to donate to Support the Oklahoma General Revenue Fund, see line 40 of Form 511.

Place an 'X' in the box associated with the dollar amount you wish to have deducted from your refund and donated to that organization. Then carry that figure over into the column at the right. When you carry your figure back to line 36 of Form 511, please list the line number of the organization to which you donated. If you donate to more than one organization, please write a "99" in the box at line 36 of Form 511.

Table with 9 rows and 6 columns. Rows include: 1 Support of Programs for Volunteers to Act as Court Appointed Special Advocates for Abused or Neglected Children, 2 Support of the Oklahoma National Guard, 3 Support of Programs for Regional Food Banks in Oklahoma, 4 Y.M.C.A. Youth and Government Program, 5 Indigent Veteran Burial Program, 6 Support the Oklahoma General Revenue Fund, 7 Oklahoma Emergency Responders Assistance Program, 8 Support of Folds of Honor Scholarship Program, 9 Total donations (add lines 1-8, enter total here and on line 36 of Form 511).

Schedule 511-H: Amended Return Information

Did you file an amended Federal return? Yes [ ] No [ ]

If Yes, provide a copy of the IRS Form 1040X or 1045 AND a copy of the IRS "Statement of Adjustment", IRS check or deposit slip. IRS documents submitted after filing this Oklahoma amended return may delay processing.

Explain the changes to income, deductions, and/or credits below. Enter the line reference number for which you are reporting a change and give the reason. If more space is needed, provide a separate schedule.

Multiple horizontal lines for providing amended return information.

**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.

**5- Indigent Veteran Burial Program**

You may donate from your tax refund for the benefit of the Oklahoma Department of Veterans Affairs Indigent Veteran Burial Program. Monies will be expended by the Oklahoma Department of Veterans Affairs to provide reimbursement to a cemetery or funeral home for costs incurred burying an indigent veteran; provided, the maximum reimbursement shall not exceed \$500 per veteran and total reimbursements made in calendar year 2017 shall be limited to \$20,000. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma Department of Veterans Affairs, P.O. Box 53067, Oklahoma City, OK 73152.

**6- Support the Oklahoma General Revenue Fund**

You may donate for the benefit of the General Revenue Fund of the State of Oklahoma. Appropriation of such funds will be subject to the provisions of Section 23 of Article X of the Oklahoma Constitution. Expenditures from the fund will be made upon warrants issued by the State Treasurer against claims filed as prescribed by law with the Director of the Office of Management and Enterprise Services for approval and payment.

**7- Oklahoma Emergency Responders Assistance Program**

You may donate from your tax refund for the benefit of the Oklahoma Emergency Responders Assistance Program. Monies will be expended by the Department of Public Safety for the purpose of providing grants to the Program for post critical incident care to all emergency first responders and their families who are experiencing emotional trauma. If you are not receiving a refund, you may still donate. Mail your contribution to: Oklahoma Department of Public Safety, Finance Department, Re: Oklahoma Emergency Responders Assistance Program, P.O. Box 11415, Oklahoma City, OK 73136-0415.

**8- Support of Folds of Honor Scholarship Program**

You have the opportunity to donate from your tax refund to support the Folds of Honor Foundation. Folds of Honor is a 501(c)(3) charitable organization that provides scholarships for K through 12 and post-secondary education for children and spouses of military service men and women fallen or disabled while serving on active duty. If you are not receiving a refund, you may still donate to Folds of Honor. Mail your contribution to: Folds of Honor Foundation, 5800 North Patriot Drive, Owasso, OK 74055.