

## City of St. Bernard Application for Tax Refund

|  |           |
|--|-----------|
| Your First Name and Middle Initial       | Last Name |
| Current home address (number and Street) | Apt#      |
| City, State and Zip Code                 |           |

Your social security number: \_\_\_\_\_ Tax year of claim: \_\_\_\_\_

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Phone Number: \_\_\_\_\_ Email address: \_\_\_\_\_

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**Reason for Claim:**

- No refunds will be issued without proper documentation indicated by reason for claim.
- 1.  Days worked outside of municipality for which the employer withheld tax. Attach a copy of your W-2 Form, a completed Log of Days Out Worksheet on page 2, and a completed Calculation for Days Worked out of St. Bernard. In addition, your employer must complete and sign the Employer Certification below and initial and date each page of the provided Log of Days Out Worksheet.
- 2.  Employer withheld at a rate higher than the municipality's tax rate of 2.1%. Attach a copy of your W-2 Form. Your employer must complete and sign the Employer Certification Below.
- 3.  Withheld by mistake for the City of St. Bernard. Attach a copy of this form along with a copy of your W-2. A letter on company letterhead signed by a supervisor stating the withholding was withheld in error and state the actual work location where work was performed.
- 4.  Other (indicate reason). Attach W-2 Form and other applicable documentation . Your employer must complete and sign the Employer Certification below.

**Refund Calculation Part 1 :**

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| <b>1 Total Workdays Available.</b> If you normally work a 5-day workweek and you worked for your employer for the entire year, enter 260 (52 weeks times 5 days). Otherwise, enter the number of days you normally worked in a week times the number of weeks worked (cannot exceed 260) | 1  |
| <b>2 Days not worked.</b> Enter total number of days included on line 1 that you did not work due to holidays, personal days, sick days, and vacation days must provide a separate breakdown of these days on page 2.  | 2  |
| <b>3 Total days actually worked.</b> Subtract line 2 from line 1   | 3  |
| <b>4 Days worked out of St. Bernard.</b> A log of days out, destination must be included. For purposes of this refund claim, if you worked in another municipality that has an income tax, the wages earned in that municipality are subject to tax in the municipality.                 | 4  |
| <b>5 Days worked in St. Bernard.</b> Subtract line 4 from line 3   | 5  |
| <b>6 Percentage of wages earned in St. Bernard.</b> Divide line 5 by line 3  | 6  |
| <b>7 Total municipal taxable wages.</b> Enter the larger of Box 5 or 18 from your W-2  | 7  |
| <b>8 Wages taxable to St. Bernard.</b> Multiply line 6 by line 7   | 8  |
| <b>9 Tax due to St. Bernard.</b> Multiply Line 8 by tax rate of 2.1%   | 9  |
| <b>10 Tax withheld to the City of St. Bernard.</b> Box 19 of provided W-2  | 10 |
| <b>11 Refund due.</b> Subtract line 9 from line 10   | 11 |

*Refunds will not be processed and will be returned in the event that the below employers signature is not completed in its entirety including signature, title, date, and phone number. Also, please note that the person applying for a refund cannot authorize their own refund. All documents will be returned, and no refund will be processed if either of these situations occur.*

**Employer Representative's Explanation of Reason for Refund and Signature**

The undersigned employer representative state that during the referenced tax year above, the employer withheld municipal income tax from the above named employee in excess of the employee's liability as calculated above; that the above referenced employee was employed during the tax year as referenced above; that the employer has examined this claim for refund in its entirety including any accompanying schedules and statements; and that the employer representative can attest that the information reported on this claim is true and accurate.

In addition, the undersign employee r representative verifies that no portion of the over-withheld tax has been or will be refunded directly to the employee by the employer, and that no adjustments to the employer's withholding account related to this claim have been or will be made.

|                                |
|--------------------------------|
| Representative ' s Signature   |
| Printed Representative' s Name |

|                               |
|-------------------------------|
| Print Representative's Title  |
| Representative's Phone Number |

\_\_\_\_\_ Date



## GENERAL INSTRUCTIONS FOR COMPLETING A CLAIM FOR REFUND FORM

- Provide clear and complete copies of W-2(s) forms that include federal, state, and local income tax information.
- **Provide a completed, signed, and dated St. Bernard municipal tax form.**
- Total workdays per year are 260: 5 days per week for 52 weeks. This may be adjusted if employment at the St. Bernard company began or ceased within the year.
- Provide complete itinerary of dates and locations worked outside of St. Bernard . When this form is submitted, the tax office in your city of residence and/or your city of employment will be notified. If the ***Itinerary of Days Worked Outside St. Bernard*** form is not applicable to your employment situation, provide a written explanation as to how your taxable income was calculated.
- Any reduction in W-2 income must be verified by appropriate copies of federal forms. Travel expenses associated with days worked outside St. Bernard are not deductible.
- Severance pay is taxable by the City of St. Bernard; however, if your severance pay is based on the number of years that you were employed by your company, you will need to prorate the total amount by the numbers of years that you worked in St. Bernard.
- Be sure to complete ALL information on the ***City of St. Bernard Non-Resident Request for Refund*** form including your signature. The bottom of the form must also be completed and signed by the appropriate supervisor or officer.
- The IRS requires that a 1099-G form be sent to you and the IRS at the end of year for refunds of \$10.00 or greater.
- Incorrect or incomplete requests will cause delays in the processing of your refund. For additional information or assistance in completing your return, please call 513-242-7710 weekdays from 9:00 AM to 5:00 PM .
- Must be filed within 3 years from the original due date for the tax year the refund is for.
- Please allow 90 days for the processing of your refund per Section 182.096(D) of the St. Bernard Code of Ordinances.