

No Staples

2011 Montana Individual Income Tax Return

Form 2

For the year Jan 1 – Dec 31, 2011 or the tax year beginning 2 0 1 1 and ending 2 0 Y Y

Mark all that apply.

Amended Return

NOL Carryback

First Name and Initial	Last Name	Social Security Number	Deceased? Date of Death
			<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Spouse's First Name and Initial	Last Name	Spouse's Social Security Number	Deceased? Date of Death
			<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>
Mailing Address		City	State Zip+4

Filing Status
 Mark only one box.

- 1 Single
- 2 Married filing jointly
- 3a Married filing separately on the same form
- 3b Married filing separately on separate forms Spouse's SSN
- 3c Married filing separately and spouse not filing
- 4 Head of household

Residency Status
 Mark only one box.

- 5a Resident full year
 - 5b Nonresident full year
 - 5c Resident part-year
- | Resident Part-Year Required Information | |
|---|---|
| Date of change ▶ | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| State moved to ▶ | <input type="text"/> <input type="text"/> |
| State moved from ▶ | <input type="text"/> <input type="text"/> |



Did you know?
You can e-file this form.
revenue.mt.gov/efile

Dependents

First Name	Last Name	Social Security Number	Relationship	Disabled
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes
				<input type="checkbox"/> Yes

Exemptions

- 6a Yourself 65 or older Blind Enter number marked ▶
- 6b Spouse 65 or older Blind Enter number marked ▶
- 6c Enter the total number of dependents. If more than 4 dependents, see instructions on page 3. ▶
- 6d Add lines 6a through 6c and enter total exemptions here. ▶

Column A (for single, joint, separate, or head of household)	Column B (for spouse when filing separately using filing status 3a)
6a <input type="text"/>	<input type="text"/>
6b <input type="text"/>	<input type="text"/>
6c <input type="text"/>	<input type="text"/>
6d <input type="text"/>	<input type="text"/>

Enter amounts on lines 7 through 38 corresponding to your federal return. Round to nearest dollar. If no entry, leave blank.

Federal Income

7	Wages, salaries, tips, etc. Include federal Form(s) W-2.	▶	7	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
8a	Taxable interest. Include federal Schedule B if required.	▶	8a	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
8b	Tax-exempt interest. Do not include on line 8a. ▶	8b <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
9	Ordinary dividends. Include federal Schedule B if required.	▶	9	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
10	Taxable refunds, credits, or offsets of state and local income taxes.	▶	10	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
11	Alimony received.	▶	11	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
12	Business income or (loss). Include federal Schedule C or C-EZ. NAICS: ▶	<input type="text"/>	12	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
13	Capital gain or (loss). Include federal Schedule D if required.	▶	13	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
14	Other gains or (losses). Include federal Schedule 4797.	▶	14	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
15a	IRA distributions. ▶	15a <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Taxable amount. ▶	15b <input type="text"/>	<input type="text"/>
16a	Pensions and annuities. ▶	16a <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Taxable amount. ▶	16b <input type="text"/>	<input type="text"/>
17	Rental real estate, royalties, partnerships, S corporations, trusts. Include federal Schedule E.	▶	17	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
18	Farm income or (loss). Include federal Schedule F.	▶	18	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
19	Unemployment compensation.	▶	19	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	
20a	Social security benefits. ▶	20a <input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	Taxable amount. ▶	20b <input type="text"/>	<input type="text"/>
21	Other income; list type. ▶	<input type="text"/>	21	<input type="text"/>	<input type="text"/>	Amount. ▶	<input type="text"/>	<input type="text"/>
22	Add the amounts in columns A and B for lines 7 thru 21. This is your total income. ▶		22	<input type="text"/>	<input type="text"/>	<input type="text"/>	<input type="text"/>	



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Federal Adjusted Gross Income

Montana AGI

Taxable Income

Tax, Nonrefundable Credits and Recapture

	Column A (for single, joint, separate, or head of household)	Column B (for spouse when filing separately using filing status 3a)
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23	Your total income from line 22.	▶	23		00		00
24	Educator expenses.	▶	24		00		00
25	Certain business expenses of reservist, etc. Include federal Form 2106 or 2106-EZ.	▶	25		00		00
26	Health savings account deduction. Include federal Form 8889.	▶	26		00		00
27	Moving expenses. Include federal Form 3903.	▶	27		00		00
28	Deductible part of self-employment tax. Attach federal Schedule SE.	▶	28		00		00
29	Self-employed SEP, SIMPLE, and qualified plans.	▶	29		00		00
30	Self-employed health insurance deduction.	▶	30		00		00
31	Penalty on early withdrawal of savings.	▶	31		00		00
32a	Alimony paid.	▶	32a		00		00
32b	Recipient's SSN. ▶ 32b						
33	IRA deduction.	▶	33		00		00
34	Student loan interest deduction.	▶	34		00		00
35	Tuition and fees.	▶	35		00		00
36	Domestic production activities deduction. Include federal Form 8903.	▶	36		00		00
37	Add lines 24 through 36 and enter the result here. <input type="checkbox"/> Federal write-ins.	▶	37		00		00
38	Subtract line 37 from line 23 and enter the result here.	▶	38		00		00
38a	Combine amounts on line 38 columns A and B and enter here. This is your federal adjusted gross income. ▶		38a			00	
39	Enter Montana additions to federal adjusted gross income from Form 2, page 4, Schedule I, line 17.	▶	39		00		00
40	Enter Montana subtractions from federal adjusted gross income from Form 2, page 5, Schedule II, line 35.	▶	40		00		00
41	Add lines 38 and 39; subtract line 40. This is your Montana adjusted gross income. ▶		41		00		00
42	Deductions <input type="checkbox"/> Standard Deduction (see Worksheet V on page 46) <input checked="" type="checkbox"/> Itemized Deductions (from Form 2, Schedule III, line 32)	▶	42		00		00
43	Subtract line 42 from line 41 and enter the result here.	▶	43		00		00
44	Exemptions (All individuals are entitled to at least one exemption.) Multiply \$2,190 by the number of exemptions on line 6d and enter the result here.	▶	44		00		00
45	Subtract line 44 from line 43 and enter the result here. This is your taxable income. ▶		45		00		00
46	Tax from the tax table on page 7 or from Form 2, page 4. If line 45 is zero or less than zero, enter zero.	▶	46		00		00
47	2% capital gains tax credit.	▶	47		00		00
48	Subtract line 47 from line 46; enter the result here, but not less than zero. This is your resident tax after capital gains tax credit. ▶		48		00		00
48a	Nonresident, part-year resident tax after capital gains tax credit. Enter here the amount from Form 2, Schedule IV, line 22, but not less than zero.	▶	48a		00		00
49	Tax on lump-sum distributions. Include federal Form 4972.	▶	49		00		00
50	Add lines 48 or 48a and 49 and enter the result here. This is your total tax. ▶		50		00		00
51	Enter the amount from Form 2, Schedule V, line 23, but do not enter an amount larger than the amount on line 50. This is your total nonrefundable credits. ▶		51		00		00
52	Recapture tax(es) (see instructions on page 7). Code <input type="text"/> <input type="text"/> Code ▶		52		00		00
53	Add lines 50 and 52, then subtract the amount on line 51 and enter the result here. This is your 2011 tax liability. ▶		53		00		00

Questions? Call us toll free at (866) 859-2254 or in Helena at 444-6900 or TDD (406) 444-2830 for hearing impaired.



