CITY OF DULUTH

See Reverse Side for Instructions

Treasury Division, Room 105, City Hall, Duluth MN 55802
(218)730-5350

2014 Sales Tax Refund
For Persons 65 Years of Age or Older
FILE BY APRIL 30, 2015: REFUND PERIOD IS MAY 1ST TO 15TH

PLEASE PRINT

COMPLETE ALL ITEMS

Last Name	First Name & Initial	Social Security Number	Date of Birth Month / Day / Year / Age
Filing Status ☐ Single ☐ Married	Spouse's First Name & Initial	Spouse's Social Security Number	Spouse's Date of Birth Month / Day / Year / Age
Street Address	Apartment No.		Phone Number _____ 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 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 through 6)		

☐ **CHECK THIS BOX IF YOU WANT THE SALES TAX DIVISION TO COMPUTE YOUR REFUND. SIGN AND RETURN THIS FORM.**

Check below the method used in calculating your refund:

☐ Method I: Multiply income on **Line 7** by .0022

☐ Method II: Actual amount of tax paid (enclose records to verify amount claimed)

Amount of refund

$ _____

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 for fraud.

_____ _____
Signature Date

_____ _____
Spouse's Signature(if Married) Date

DO NOT WRITE BELOW THIS LINE

Return checked by: _____ Approved by: _____

INSTRUCTIONS

Who May Apply:

1. You must have attained the age of 65 or over by December 31, of last year, ***and***
2. You must have resided within the city limits of Duluth during the ***entire*** calendar year, ***and***
3. a. If you are single, your annual income on Line 7 cannot exceed **$17,116.00,** or
   b. If you are married filing jointly, your annual income on Line 7 cannot exceed **$22,832.00,** or
   c. If you are married but only one of you is 65 or older, that person may file as single. Your annual income on Line 7 cannot exceed **$17,116.00 and** your household income with your spouse under age 65 **must not exceed $22,832.00**.

Income Defined:

Income shall be the adjusted gross income as reported on your Federal Income Tax Return, if filed, **plus** amounts from all other sources. This shall include **Social Security**, Railroad Retirement, Veteran's Disability Pensions, Private Pensions, Wages, Interest, Dividends, Public Assistance, State & City refunds (including last year's sales tax refund), Emergency Assistance, Rent Credits, etc. This pertains to income received in the previous calendar 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 made a major purchase such as an automobile, 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 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 Sales Tax Division, the amount substantiated will be refunded.

When to Apply:

Anytime between January 1, and April 30, following the year for which the refund is filed. No applications for this refund will be accepted after April 30.

How to Apply:

1) Complete the application. 2) Sign the application. 3) Mail or deliver to:

City of Duluth
Treasury Division
411 West First Street, Room
105 Duluth, Minnesota 55802

Please contact us if you have any questions.
Telephone: (218) 730-5350 Fax: (218) 730-5917
Office Hours: Monday through Friday, 8:00 AM through 4:30 PM