

CHECKLIST for OL-3 RETURN PREPARATION

(To have this form mailed to you, call 502-574-4860.)

WHO IS ELIGIBLE?

Individual tax filers only. (1040 tax filers)

(Partnerships, S-Corps, Corporations, and all other non-individual tax filers are not eligible.)

For assistance, call 502-574-4860. To schedule an appointment, call 502-574-4900.)

REQUIREMENTS

- Completed Checklist
- Your complete federal tax return (federal form **1040**)
 - include all W-2s reporting wages paid to you
 - include all 1099 MISC forms that report income paid to you
- Signature of the taxpayer
- Contact Information—updated phone number, address, and email address
- Ability to pay balance by mail once the return is complete

+++++

CHECKLIST (For the 2019 tax year ONLY)

Please Circle

Did you earn all your income in Louisville Metro?	YES	NO
• If no, provide the amount of income earned in Louisville Metro.	\$ _____	
If you received 1099 MISC Form(s), was all the income earned in Louisville Metro?	YES	NO
• If no, how much of your 1099 MISC income was earned in Louisville Metro?	\$ _____	
If you received W-2s , were all the wages earned in Louisville Metro?	YES	NO
• If no, how much of your total wages were earned in Louisville Metro?	\$ _____	
Did you have paid employees who worked in Louisville Metro in 2019?	YES	NO
• If yes, what were the total wages paid to employees in Louisville Metro?	\$ _____	
Did you pay contract labor over \$600 to any individual or business?	YES	NO

+++++

- ❖ This form and all required documentation must be dropped off or postmarked by **July 15th**. (Any form and documentation dropped off or postmarked **after July 15th** will be subject to penalty and interest.)
- ❖ **MAIL OR DELIVER TO: 617 W Jefferson St.
Louisville, KY 40202**
- ❖ If this checklist form is incomplete or the federal return and required documentation is missing, we will not be able to prepare the OL-3 return. We will contact you by phone between 8am – 5pm Mon-Fri. to inform you.
- ❖ Once the return is prepared, we will mail you a copy of the return and contact you by phone with any tax balance due. The payment is due by July 15th or, if contacted after July 15th, within five (5) calendar days from the date of the call. If the balance is not paid in full by the due date or within that 5-day period, penalty and interest will be assessed.

By signing below, you agree to have a Louisville Metro Representative prepare your OL-3 return in your absence using this checklist, federal returns, and any other supporting documentation received.

Signature _____ Date _____

Phone _____ Email _____

Address _____