

MARYLAND SPECIAL REFUND REQUEST



FOR SINGLE AND DEPENDENT TAXPAYERS NOT OTHERWISE REQUIRED TO FILE A TAX RETURN

Please Print Blue or Black Ink Only

YOUR SOCIAL SECURITY NUMBER

Your first name, Initial, Last name

Social Security Number boxes

Present address (No. and street), City or town, State, Zip code

Name of county and incorporated city, town or special taxing area in which you were a resident on the last day of the taxable period. (See Page 2), Maryland county, City, town or taxing area

YOUR FILING STATUS -

Single (If you can be claimed as a dependent on another person's tax return) CHECK HERE

1. COMPLETE CHECKLIST BELOW BEFORE FINISHING FORM 2. PLEASE PRINT YOUR NUMBERS LIKE THIS:

9 8 7 6 5 4 3 2 1 0

WHO MAY USE THIS FORM?

You may use this form (Form 123) if you answer YES to all of these questions and you do not claim an earned income credit on your federal return. If you do claim an earned income credit, use Form 503.

- 1. Are you single? 2. Does your income consist solely of wages, tips, interest, dividends and/or capital gain distributions? 3. Is your total income less than \$7,700.00? 4. Were you a resident of Maryland all year? 5. Was Maryland tax withheld from your wages?

STAPLE WAGE AND TAX STATEMENTS HERE

REPORT YOUR TOTAL GROSS INCOME HERE 1A. Total wages, salaries & tips \$ 1B. Interest, dividend and capital gain distribution income \$ 1C. Total gross income (add 1A & 1B) MINIMUM FILING REQUIREMENT 2. Subtract this amount from line 1C 3. If after subtracting line 2 from line 1C your answer is less than 0, enter 0 and continue. If your answer is more than 0 you cannot use this form. MARYLAND TAX WITHHELD ATTACH W-2 FORMS 4. Enter the amount of Maryland and local tax withheld from your wages. CONTRIBUTIONS If you wish to donate part or all of your refund enter amount: 5. Chesapeake Bay and Endangered Species Fund 6. Fair Campaign Financing Fund 7. Total contributions (add lines 5 and 6) REFUND 8. Subtract the amount on line 7, if any, from line 4. See line 9. THIS IS YOUR REFUND

DIRECT DEPOSIT OF REFUND (See instructions on the back of this form.) Please be sure the account information is correct. 9. To choose the direct deposit option, complete the following information: 9a. Type of account: Checking Savings 9b. Routing number 9c. Account number

Daytime telephone no. Home telephone no. CODE NUMBER FOR OFFICE USE ONLY Check here if you use a paid preparer and do not want Maryland forms mailed to you next year.

Under penalties of perjury, I declare that I have examined this return, including accompanying schedules and statements and to the best of my knowledge and belief it is true, correct and complete. If prepared by a person other than taxpayer, the declaration is based on all information of which the preparer has any knowledge. Check here if you authorize your preparer to discuss this return with us.

Your signature Date Signature of preparer other than taxpayer Preparer's SSN or PTIN Address and telephone number of preparer



### ELECTRONIC FILING

The fastest way to receive your refund is to file electronically and request direct deposit. If you request direct deposit on your electronic return your refund should be in your bank account within 72 hours of acknowledgement from the Revenue Administration Division. You may file your return electronically through your personal computer. For more information please see our website at [www.marylandtaxes.com](http://www.marylandtaxes.com) or the 2002 Maryland Resident Tax Package.

Additionally, a return can be electronically filed by most professional tax return preparers. Please ask your preparer about this option.

### USE THIS FORM IF:

- Your filing status is single (even if you can be claimed as a dependent on another person's tax return).
- **Your total income was less than \$7,700.00.**
- Your income consists of wages, tips, interest, dividends and/or capital gain distributions.
- You are able to answer YES to all of the questions in the checklist.

### COMPLETING FORM 123

Please print your numbers inside the boxes using blue or black ink. Do not type your numbers or use red ink. If no entry is required for a specific line, leave blank. Do not enter words such as "none" or "zero" and do not draw a line to indicate no entry. Do not use dollar signs. You may round off cents to whole dollars. To do so, drop amounts under 50 cents and increase amounts that are 50 cents or more. For example, \$129.49 becomes \$129 and \$129.50 becomes \$130. If you round off, do so for all amounts. But if you have to add two or more amounts to figure the amount to enter on a line, include cents when adding and round off only the total.

### NAME, ADDRESS AND SOCIAL SECURITY NUMBER

Print your name, address and social security number on your form.

### COUNTY, CITY, TOWN

Fill in the boxes for MARYLAND COUNTY and CITY, TOWN OR TAXING AREA based on your residence on the last day of the taxable period:

### BALTIMORE CITY RESIDENTS:

Leave the MARYLAND COUNTY box blank.  
Write "Baltimore City" in the CITY, TOWN OR TAXING AREA box.

### RESIDENTS OF MARYLAND COUNTIES: (NOT BALTIMORE CITY):

1. Write the name of your county in the MARYLAND COUNTY box.
2. If you lived within an incorporated tax area, write its name in the CITY, TOWN OR TAXING AREA box.
3. If you did not live in one of the areas, leave the CITY, TOWN OR TAXING AREA box blank.

### FILING STATUS

You must be single to be able to use this form. If you can be claimed as a dependent on another person's tax return, be sure to check the box in the filing status area.

### REPORT YOUR INCOME

Add up the wages reported on all of your W-2 forms and enter the total on line 1A.

Add up your interest, dividend and capital gain distribution income (if any) from the 1099 forms sent to you by your bank, credit union, broker, etc. Enter the total on line 1B. You must report all your interest even if you don't get a Form 1099.

Enter the total of the amounts on lines 1A and 1B on line 1C. This is your total gross income. If this amount is \$7,700.00 or more, you cannot use this form. You must file either Form 503 or Form 502.

### FIGURE YOUR REFUND

**Line 4.** Add up all the amounts of Maryland and local tax withheld using the figures on your W-2 forms. Write the total on line 4 and attach the state copy of each W-2 to your form. Do not include in this amount any tax paid to another state or to the federal government.

**Line 5 through 8.** The total amount of Maryland and local tax withheld from your wages is your refund, unless you want all or part of it to be donated to the Chesapeake Bay and Endangered Species Fund or the Fair Campaign Financing Fund. Enter the amount you wish to donate on lines 5 and 6 and the total on line 7. Subtract line 7 from line 4 and enter your refund on line 8.

### DIRECT DEPOSIT OF REFUND

Complete lines 9a, b and c if you want us to directly deposit the amount shown on line 8 into your account at a bank or other financial institution (such as a mutual fund, brokerage firm, or credit union) instead of sending you a check.

**Line 9a:** Check the appropriate box to identify the type of account to be entered in 9c.

**Line 9b:** The routing number **must** be **nine** digits. If the first two digits are not 01 through 12 or 21 through 32, the direct deposit will be rejected and a check sent instead. If you are not sure of the correct routing number, contact your financial institution.

**Line 9c:** The account number can be up to 17 characters (both numbers and letters). Include hyphens but omit spaces and special symbols. Enter the number from left to right and leave any unused boxes blank.

If we are notified by the financial institution that the direct deposit is not successful, a refund check will be mailed to you.

### DISCLOSURE:

Entering your bank account routing and transit number, account number and account type in the area provided on your Maryland income tax return to effect a direct deposit of your income tax refund authorizes the Comptroller's Office to disclose this information and your refund amount to the Maryland Treasurer's Office who performs banking services for the Comptroller's Office.

### SIGNATURE

You must sign and date this form. If you pay someone to prepare this form, that person must sign it also.

### MAILING INSTRUCTIONS

If you do not choose to file electronically, mail Form 123 by April 15, 2003. Mail the form to:

**Comptroller of Maryland  
Revenue Administration Division  
Annapolis, MD 21411-0001**