

<div>CITY OF PHILADELPHIA • DEPARTMENT OF REVENUE</div> <div>REFUND PETITION</div> <div>For all refunds except Individual Employee Wage Tax</div>			PETITION NUMBER (Office use only)		
			FUND	SOURCE	INDEX
SEE INSTRUCTIONS ON REVERSE. CLEARLY PRINT OR TYPE ALL INFORMATION.					
1. PETITIONER'S NAME (Please provide a contact person: First Name, Middle Initial, Last Name)					
2. BUSINESS, ENTITY, OR INDIVIDUAL NAME (Who will receive this refund?)			4. SOCIAL SECURITY NUMBER		
3. MAILING ADDRESS			5. FEDERAL EMPLOYER IDENTIFICATION NO.		
CITY		STATE		ZIP CODE	
6. PROPERTY ADDRESS (For Real Estate, Water, Commercial Waste and Business Use & Occupancy Refunds <u>only</u>)					
7. E-MAIL ADDRESS			PHONE NUMBER		
8. REFUND TYPE (Check all that apply. For Wage Tax, Real Estate Tax, Police Services, NPT, KOZ, and Other, see important information on reverse.)					
<div><div><input type="checkbox"/> Amusement Tax</div><div><input type="checkbox"/> Business Income & ReceiptsTax Tax</div><div><input type="checkbox"/> Commercial Trash Fee</div><div><input type="checkbox"/> Development Impact Tax</div><div><input type="checkbox"/> Earnings Tax</div></div> <div><div><input type="checkbox"/> Hotel Tax</div><div><input type="checkbox"/> Licenses & Permits</div><div><input type="checkbox"/> Liquor Tax</div><div><input type="checkbox"/> Net Profits Tax</div><div><input type="checkbox"/> Parking Tax</div></div> <div><div><input type="checkbox"/> Police Services Fee</div><div><input type="checkbox"/> Real Estate Tax</div><div><input type="checkbox"/> School Income Tax</div><div><input type="checkbox"/> Tobacco Tax</div><div><input type="checkbox"/> Other or Departmental Payments (specify)_____</div></div> <div><div><input type="checkbox"/> Tobacco Tax</div><div><input type="checkbox"/> Use & Occupancy Tax</div><div><input type="checkbox"/> Wage Tax</div><div><input type="checkbox"/> Water / Sewer Charges</div></div>					

Instructions for Completing the Refund Petition

This form is to be used for **all** refund requests *except* Individual Employee Wage Tax. Individuals should file Employee Wage Tax refund petitions at **tax-services@phila.gov**. **Employers** must use this petition for withheld wage tax refund requests.

1. **Individuals** - Enter the name of the petitioner.
2. **Business Name** - For non-individual petitioners, enter the name of the entity.
3. **Mailing Address** - Enter the address for the petitioner. NOTE, refunds are mailed to the mailing address on file with the Department of Revenue.
- 4 and 5. **Social Security and Federal Employer Identification Numbers** - Individuals must enter a complete Social Security number. All other entities must enter a Federal Employer Identification Number.
6. **Property Address** - This is required for all Real Estate, Water/Sewer, Commercial Waste and Business Use & Occupancy petitions. Enter the address of the property for which the refund is being requested.
7. **Contact Information** - Provide a phone number and e-mail address where you can be reached.
8. **Refund Type** - Check the appropriate block(s). If the type is not listed on the front of this form, check "Other" and specify the type of refund requested. A single Refund Petition may be used for multiple tax types and years.
 - A. **Tax Account Number** - Enter the tax specific account number(s). (NOTICE Not your PHTIN)
 - B. **Tax Years and/or Tax Periods** - If tax is an annual tax, enter year. If tax is periodic, eg., quarterly or monthly, enter period(s) and year(s). If requesting a Police Services Fee refund, write the event date.
 - C. **Amount of Claim** - Enter the amount of the refund requested.
9. **Reason for Refund** - Enter the reason for refund. If you have additional documentation, attach it to this petition. If you select a refund by Direct Deposit, attach the ACH Refund Authorization form. Find it at **phila.gov/revenue** or as the last page of these instructions. If your refund is returned because you provided bad bank information, Revenue will automatically issue a paper check refund. ACH refunds are not available for Real Estate Tax, Water or Sewer Charges, or Other Departmental charges.

Wage Tax - If this refund request resulted from a duplicate payment, provide supporting documentation. Revenue only issues refunds to the original payor. If you have questions about your filing requirements, application of payments or tax balances, call Taxpayer Services at 215-686-6600.

Real Estate - Refund requests must be accompanied by a copy of the front and back of the canceled check(s). If the refund is due to a sale of the property or refinancing, you must also supply a copy of the settlement sheet. Mortgage companies must supply a copy of the disbursement/check listing.

This petition must be signed and dated! If you have any questions about the preparation of this petition, see the contact information on the front of this form.

OFFICE USE ONLY - Licenses and Permits; Interdepartmental Refunds and Other - All petitions must include the signature and title of the Department's authorized designee, along with the Fund, Source and Index Code of the payment in addition to the petitioner's signature.

Request direct deposit for your Philadelphia Tax Refund



If you have submitted a refund petition, instead of getting a check in the mail you can request that the City send your refund directly to your bank account. Attach this form along with your refund petition. You may not request direct deposit for refunds for Real Estate Tax or non-tax fees.

Save time, do this online:

tax-services.phila.gov

You can apply for a Philadelphia Wage Tax Refund online and request direct deposit of the refund with your petition.

1 Contact Information

All requests must complete this section

Select one:

- ☐ General Refund Petition (not available for Real Estate Tax or non-tax fees.)
- ☐ Wage Tax Refund Petition
- ☐ Low-Income Wage Tax Refund Petition

Petitioner name

Phone number

Email address

Tax Type

Tax Year



Mail completed form to:

Philadelphia Department of Revenue
PO Box 53360
Philadelphia, PA 19105-1410

Questions? (215) 686-6600
revenue@phila.gov

If the bank returns your direct deposit refund due to incorrect account information, the Department will mail a paper refund check automatically to the mailing address you provided on the petition.

2 Business or individual information

For businesses

Philadelphia Tax ID Number (PHTIN)

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Employer Identification Number (EIN) (if applicable)

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For individuals

Social Security Number

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Spouse Social Security Number (if applicable)

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3 Banking information

Routing number

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Account number

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Account type:

☐ Checking

☐ Savings

4 Refund amount

Total amount of refund to be refunded through direct deposit:

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