

**REFUND REQUEST FORM**  
**For Years Beginning On or After January 1, 2008**  
**WARREN COUNTY SCHOOLS OCCUPATIONAL TAX OFFICE**  
P.O. Box 51530, 303 Lovers Lane, Bowling Green, KY 42103

EMPLOYER NAME \_\_\_\_\_ FEDERAL ID # \_\_\_\_\_

EMPLOYEE NAME \_\_\_\_\_ SOCIAL SEC. # \_\_\_\_\_

MAILING ADDRESS \_\_\_\_\_ HOME PHONE# \_\_\_\_\_

CITY, STATE, ZIP \_\_\_\_\_ WORK PHONE# \_\_\_\_\_

EMAIL ADDRESS \_\_\_\_\_

PERIOD IN WHICH APPLYING FOR REFUND FROM \_\_\_\_\_ TO \_\_\_\_\_

REASON APPLYING FOR REFUND \_\_\_\_\_

**IF APPLYING FOR MULTIPLE YEARS COMPLETE SECTION I**

**W2(S) AND PROOF OF RESIDENCY ARE REQUIRED FOR ALL REFUNDS**

**SECTION I**

TAX YEAR \_\_\_\_\_ GROSS WAGES \$ \_\_\_\_\_ REFUND AMOUNT \$ \_\_\_\_\_

TAX YEAR \_\_\_\_\_ GROSS WAGES \$ \_\_\_\_\_ REFUND AMOUNT \$ \_\_\_\_\_

**TOTAL REFUND**

\$

**COMPLETE SECTION II IF APPLYING FOR A PARTIAL REFUND**

**SECTION II W-2 AND EVIDENCE OF NON TAXABLE INCOME ARE REQUIRED**

1. Gross Wages.....
2. Warren County Occupational Tax Withheld.....
3. Total Number of Days Worked During the Year.....
4. Total Number of Days Worked Outside Warren County, Kentucky.....
5. Percentage Worked Outside Warren County, Kentucky (line 4 divided by line 3).....
6. Wages Not Subject to Warren County Occupational Tax (line 1 x line 5).....
7. Refund Due (line 6 x line .005).....

EMPLOYEE SIGNATURE \_\_\_\_\_ DATE \_\_\_\_\_

PRINT NAME \_\_\_\_\_

**REFUND APPLICATION PROCESS**  
**For Years Beginning On or After January 1, 2008**  
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**\*\*According to the Warren County Schools Occupational Tax Ordinance, in effect for years beginning on or after January 1, 2008, § 8 – Refunds:**

A refund may be filed within two (2) years of the due date of the return or the date the money was paid to the tax district, whichever is later. (See Ordinance for further detail or contact our office at 270.842.7168 with any questions regarding the refund timeline)

If you do not live in the Warren County Public School District but have had Warren County Schools Occupational Taxes withheld from your wages, you may receive a refund of that withholding. You will be required to provide certain supporting documents to assist with the processing of your request.

**I. A W-2 WILL BE REQUIRED FOR EACH YEAR A REFUND IS REQUESTED.**

Your W-2 must clearly indicate the amount of Warren County Schools Occupational Tax withheld from your earnings. The Warren County Schools Occupational Tax (tax rate of .50%) should be shown separately from the Bowling Green City Occupational Tax (tax rate of 1.85%) and the Warren County Government Occupational Tax (tax rate of 1.00%).

**II. PROOF OF ADDRESS**

If you are a property owner, your utility company will be able to provide you with a statement indicating the date utilities were activated in your name and that you are currently residing at that address. If you are not a property owner and cannot obtain such a statement, you should call this office to discuss other forms of proof of residency. A driver's license is not an acceptable proof of residency.

**III. MAIL REQUEST TO**

Finance Officer  
Warren County Schools Occupational Tax Office  
P.O. Box 51530  
Bowling Green, KY 42102-5830.

**Note:** Please be aware that “City of Bowling Green Annexed Areas” are within the Warren County School District.