

Homeowners Verification of 2008 Property Taxes

(Use blue or black ink. See instructions for completion on back.)

Part I — To Be Completed by Applicant (Part II to be completed by tax collector)

Social Security # _____ - _____ Spouse's/CU Partner's Social Security # _____ - _____

Name _____
Last Name, First Name, and Initial (Joint filers enter first name and initial of each - Enter spouse's/CU partner's last name ONLY if different)

Address _____
Street City State Zip Code

Block _____ Lot _____ Qualifier _____

- A. Did you own your principal residence with someone who was not your spouse/CU partner? Yes No
- B. If yes, indicate the share (percentage) of the property that you (and your spouse/ CU partner) owned. %
- C. Does your principal residence have more than one unit? Yes No
- D. If yes, indicate the share (percentage) of the property used as your principal residence. %

Part II — To Be Completed by Tax Collector

2008 Property Taxes

- 1. Total Amount Levied by Municipality (before Deductions and/or Credits are subtracted) \$ _____
- 2. Total 2008 Taxes Paid by Homeowner(s) by 6/1/09 \$ _____
- 3. Senior Citizen's Deduction \$ _____
- 4. Veteran's Deduction \$ _____
- 5. REAP Credit \$ _____
- 6. Total Deductions and Credits (Add Lines 2, 3, 4, and 5) \$ _____
If Line 6 is equal to Line 1, complete Line 7
- 7. Enter amount from Line 6. If applicant answered "Yes" to Questions A and/or C above, the amount on Line 7 must be apportioned. See instructions on back. \$ _____



Applicant enters this amount on Line 10, Form PTR-2 ← ↑

I certify that I am the local tax collector of _____, where the above property is located. I further certify that the above-stated amounts of property taxes due and paid for calendar year 2008 are true and accurate to the best of my knowledge. I have placed my stamp below for verification.

(Name)

(Title)

Form PTR-2A – Instructions

Part I – To Be Completed by Applicant

Social Security Number. If your marital/civil union status as of December 31, 2008, was single, enter only your social security number in the space provided on Form PTR-2A. If your status as of December 31, 2008, was married/CU couple, you must report both applicants' numbers in the order in which the names are listed on the application. If you were married or in a civil union but living apart from your spouse/civil union partner, and you did not have access to or receive support from their income, you are considered "Single" for purposes of the property tax reimbursement and you should enter only your social security number on Form PTR-2A.

Name and Address. Print or type your name (last name first) and complete address of the property for which you are claiming the reimbursement in the spaces provided. Also include your spouse's/civil union partner's name if filing jointly.

Block/Lot/Qualifier. Enter the block and lot number of the principal residence for which you are claiming the reimbursement in the spaces provided. Include qualifier if applicable. (Only condominiums may have qualifiers assigned to them.)

- A. Multiple Owners.** Check "Yes" if you owned your principal residence with someone else (other than your spouse/civil union partner) — even if the other owner(s) did not reside in the home. For example, you and your sister own the home you live in. If you (and your spouse/civil union partner) were the sole owner(s), check "No."
- B. Percentage of Ownership.** If you answered "Yes" at Line A, enter the share (percentage) of the property that you (and your spouse/civil union partner) owned. For example, if you and your spouse/civil union partner own your principal residence equally with your daughter, you and your spouse/civil union partner own one-half of the property and must enter 50% as your share of ownership. The shares of ownership of the property are considered to be held equally by all owners. If the shares of ownership are not equal, you must provide documentation as to the percentage of ownership.
- C. Multi-Unit Properties.** Check "Yes" if your principal residence consisted of more than one unit. For example, you own a property which consists of four residential units and you occupy one of the units as your principal residence. If your principal residence consisted of only one unit, check "No."
- NOTE:** Residents of co-ops and continuing care retirement facilities are not considered to be living in multi-unit dwellings and should check "No."
- D. Percentage of Occupancy.** If you answered "Yes" at Line C, enter the share (percentage) of the property used as your principal residence. For example, if you and your spouse/civil union partner own a duplex and live in one-half of the property and your daughter lives in the other half, you must enter 50% as your share of occupancy.

Part II – To Be Completed by Tax Collector

Enter the appropriate amounts for calendar year 2008 as follows:

Line 1. Enter the amount of property taxes levied by the municipality before any deductions and/or credits are subtracted (e.g., senior citizen's deduction).

Line 2. Enter the total amount of property taxes paid by, or on behalf of, the homeowner(s). Enter only amounts actually due for the year provided they were paid by June 1, 2009.

Line 3. Enter the amount of any senior citizen's deduction the homeowner(s) received.

Line 4. Enter the amount of any veteran's deduction the homeowner(s) received.

Line 5. Enter the amount of any Regional Efficiency Aid Program (REAP) credit the homeowner(s) received.

Line 6. Add Lines 2, 3, 4, and 5 and enter the total on Line 6. Compare Lines 1 and 6.

- If Line 6 is equal to Line 1, complete the balance of Form PTR-2A.
- If Line 6 is not equal to Line 1, the applicant is not eligible for a property tax reimbursement. **Do not complete the balance of Form PTR-2A.**

Line 7. If the applicant answered "No" to the questions at both Line A and Line C, enter the amount of property taxes from Line 6.

If the applicant answered "Yes" at either Line A or Line C, the amount of property taxes to be entered on Line 7 must be apportioned. If title to the property is held by the eligible applicant with others as tenants in common or joint tenants (except in the case of husband and wife or civil union partners), or if the property consists of more than one unit, the applicant is only eligible for the proportionate share of the reimbursement which reflects the percentage of ownership or the percentage of occupancy.

Multiple Owners. If the applicant answered "Yes" at Part I, Line A, multiply the amount of property taxes on Line 6 by the percentage of ownership shown at Part I, Line B and enter the result on Line 7.

Multi-Unit Properties. If the applicant answered "Yes" at Part I, Line C, multiply the amount of property taxes on Line 6 by the percentage of occupancy shown at Part I, Line D, and enter the result on Line 7.

If the applicant answered "Yes" to the questions at both Lines A and C, multiply the amount of property taxes on Line 6 by the percentage of occupancy shown at Part I, Line D, and enter the result on Line 7.

Certification. Complete the certification portion of Form PTR-2A. Sign the certification and place the authorization stamp in the space provided. (Use blue or black ink.)