

2009

New Jersey

Property Tax Reimbursement

Filing Deadline Extended to

→ November 1, 2010 ←

NOTE: The State Budget for fiscal year 2011, contains modifications to the Property Tax Reimbursement (PTR) Program. Under the terms of the Budget, only those applicants who received a reimbursement for tax year 2008 and whose income for 2009 does not exceed the 2008 income limit of \$70,000 will receive a reimbursement for 2009, provided they met all the other program requirements. The Budget also provides that the reimbursement amount for tax year 2009 cannot exceed the amount approved for payment for tax year 2008.

The Division of Taxation will accept 2009 PTR applications from residents who either did not file a 2008 application or who filed an application for 2008 that was not approved for payment. While these applicants will not receive reimbursements for 2009, they should apply to establish their eligibility for benefits in future years.

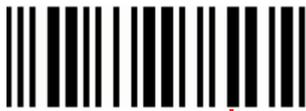
FOR INFORMATION:

Visit the Division of Taxation Web Site:

Call the Property Tax Reimbursement Hotline:

www.state.nj.us/treasury/taxation/

1-800-882-6597



You must enter your social security number below

Form section for personal information including Social Security Numbers, Last Name, First Name and Initial, Home Address, City, Town, Post Office, State, and Zip Code.

- 1. Residency Status: Homeowner or Mobile Home Owner
2. Your Marital/Civil Union Status on December 31, 2008: Single or Married/CU Couple
3. Your Marital/Civil Union Status on December 31, 2009: Single or Married/CU Couple

- 4a. On December 31, 2008, I (or my spouse/CU partner) was Age 65 or older or Receiving Federal Social Security Disability Benefits.
4b. On December 31, 2009, I (or my spouse/CU partner) was Age 65 or older or Receiving Federal Social Security Disability Benefits.

- 5. Did you live in New Jersey continuously since before January 1, 1999, as either a homeowner or a renter?
6. Did you own and live in your New Jersey home (or lease a site in a mobile home park in New Jersey on which you placed a manufactured or mobile home that you own) since before January 1, 2006?

7. Complete Income Worksheet A (on reverse) and enter the amount of 2008 Total Income from Line r.
8. Complete Income Worksheet B (on reverse) and enter the amount of 2009 Total Income from Line r.

9. Enter the address for which you are claiming the reimbursement if different from above. Street address Municipality

10. Homeowners: Enter the block and lot numbers of the residence for which the property tax reimbursement is being claimed. Block Lot Qualifier

- 11a. Did you share ownership of your principal residence with anyone other than your spouse/CU partner? (Mobile Home Owners see instructions.)
11b. If you answered "Yes," indicate the share (percentage) of the property owned by you (and your spouse/CU partner)
12a. Does your principal residence consist of more than one unit?
12b. If you answered "Yes," indicate the share (percentage) of the property that you (and your spouse/CU partner) occupy as your principal residence.

If you answered "Yes" at Line 11a or Line 12a, be sure to read the instructions on pages 8-9 before you complete Lines 13 and 14.

13. Enter your total 2009 property taxes due and paid on your principal residence. (For Mobile Home Owners, property taxes are your total site fees paid multiplied by 0.18)

14. Enter your total 2008 property taxes due and paid on your principal residence. (For Mobile Home Owners, property taxes are your total site fees paid multiplied by 0.18)

REIMBURSEMENT AMOUNT

15. Subtract Line 14 from Line 13.

If Line 15 is zero or less, you are not eligible for a property tax reimbursement and you should not file this application.

Division Use 1 2 3 4 5 6

SIGN HERE section containing signature lines for applicant and preparer, identification numbers, and firm name, along with the Due Date and mailing information.

**Income Worksheet A
2008 Total Income**

If you were married or in a civil union as of December 31, 2008, you must combine your income with your spouse's/CU partner's income.

- a. Social Security Benefits _____
(including Medicare Part B premiums)
- b. Total Pension Income _____
(including IRA and annuity income)
- c. Salaries and Wages _____
- d. Bonuses, Commissions & Fees ... _____
- e. Unemployment Benefits _____
- f. Disability Benefits (including
veterans' and black lung benefits) . _____
- g. Interest (taxable & exempt) _____
- h. Dividends _____
- i. Net Capital Gains _____
- j. Net Rental Income _____
- k. Net Business Income _____
- l. Support Payments _____
- m. Inheritances _____
- n. Royalties _____
- o. Gambling & Lottery Winnings _____
(including New Jersey)
- p. Bequests and Death Benefits _____
- q. All Other Income _____
- r. TOTAL _____

Was your total 2008 income \$70,000 or less? You must report combined income of both spouses/CU partners if your status at Line 2 of the application was "Married/CU Couple."

- Yes. Enter the total amount on Line 7 and continue with Income Worksheet B.
- No. STOP. You are not eligible for a property tax reimbursement.

**Income Worksheet B
2009 Total Income**

If you were married or in a civil union as of December 31, 2009, you must combine your income with your spouse's/CU partner's income.

- a. Social Security Benefits _____
(including Medicare Part B premiums)
- b. Total Pension Income _____
(including IRA and annuity income)
- c. Salaries and Wages _____
- d. Bonuses, Commissions & Fees ... _____
- e. Unemployment Benefits _____
- f. Disability Benefits (including
veterans' and black lung benefits) . _____
- g. Interest (taxable & exempt) _____
- h. Dividends _____
- i. Net Capital Gains _____
- j. Net Rental Income _____
- k. Net Business Income _____
- l. Support Payments _____
- m. Inheritances _____
- n. Royalties _____
- o. Gambling & Lottery Winnings _____
(including New Jersey)
- p. Bequests and Death Benefits _____
- q. All Other Income _____
- r. TOTAL _____

Was your total 2009 income \$80,000 or less? You must report combined income of both spouses/CU partners if your status at Line 3 of the application was "Married/CU Couple."

- Yes. Enter the total amount on Line 8 and continue completing the application.
- No. STOP. You are not eligible for a property tax reimbursement.

Proof of Age or Disability for 2008 and 2009 Must Be Submitted With Application

Age 65 or Older. If you (or your spouse/CU partner) indicated at Line 4a and/or 4b that you were 65 or older, you must submit proof of age with your application. Examples of acceptable documentation include copies of the following:

- Birth Certificate
- Driver's License
- Church Records

Receiving Federal Social Security Disability Benefits. If you (or your spouse/CU partner) were under 65 and indicated at Lines 4a and/or 4b that you (or your spouse/CU partner) were receiving Federal Social Security Disability Benefits, you must submit with your application a copy of the Social Security Award Letter indicating that you (or your spouse/CU partner) were receiving benefits for that year(s) based on your own social security number.