

Form PTR-1A

Homeowners

Verification of 2002 and 2003 Property Taxes

(see instructions on back)

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

Social Security Number _____ - _____ Spouse's Social Security Number _____ - _____

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

Address _____
Street City State Zip Code

Block _____ Lot _____ Qualifier _____

- | | 2002 | 2003 |
|--|--|--|
| A. Did you own your principal residence with someone who was not your spouse? | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| B. If yes, indicate the share (percentage) of the property that you (and your spouse) owned. | <input type="text"/> <input type="text"/> % | <input type="text"/> <input type="text"/> % |
| C. Does your principal residence have more than one unit? | Yes <input type="checkbox"/> No <input type="checkbox"/> | Yes <input type="checkbox"/> No <input type="checkbox"/> |
| D. If yes, indicate the share (percentage) of the property used as your principal residence. | <input type="text"/> <input type="text"/> % | <input type="text"/> <input type="text"/> % |

Part II — To Be Completed by Tax Collector

2002 Property Taxes

- Total Amount Levied by Municipality (before Deductions and/or Credits are subtracted) \$ _____
- Total Amount Paid by Homeowner(s) \$ _____
- Senior Citizen's Deduction \$ _____
- Veteran's Deduction \$ _____
- REAP Credit \$ _____
- Total Deductions and Credits (Add Lines 2, 3, 4, and 5) \$ _____
- Amount for Line 14, Form PTR-1 (Enter amount from Line 6. If applicant answered "Yes" to Questions A or C above, see instructions on back.) \$ _____



2003 Property Taxes

- Total Amount Levied by Municipality (before Deductions and/or Credits are subtracted) \$ _____
- Total Amount Paid by Homeowner(s) \$ _____
- Senior Citizen's Deduction \$ _____
- Veteran's Deduction \$ _____
- REAP Credit \$ _____
- Total Deductions and Credits (Add Lines 2, 3, 4, and 5) \$ _____
- Amount for Line 13, Form PTR-1 (Enter amount from Line 6. If applicant answered "Yes" to Questions A or C above, see instructions on back.) \$ _____



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 years 2002 and 2003 are true and accurate to the best of my knowledge. I have placed my stamp below for verification.

 (Name)

 (Title)

(If you complete this form, be sure to enclose it with your Form PTR-1 application)

Form PTR-1A – Instructions

Part I – To Be Completed by Applicant

Social Security Number. If your marital status as of December 31, 2003, was single, you must enter your social security number in the space provided on Form PTR-1A. If your marital status as of December 31, 2003, was married, you must report both spouses' numbers in the order in which the names are listed on the application. If you were married but living apart from your spouse, and you do not have access to or receive support from your spouse's income, you are considered "Single" for purposes of the property tax reimbursement and you should enter only your social security number on Form PTR-1A.

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 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" only if you owned your principal residence with someone else (other than your spouse). For example, you and your sister own the home you live in. If you (and your spouse) 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) owned. For example, if you and your spouse own your principal residence equally with your daughter, you and your spouse 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 consists 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 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 years 2002 and 2003 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 and paid for each calendar year.

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

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

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

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

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

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 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 in the same year, 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-1A. Sign the certification and place the authorization stamp in the space provided.