

2015

New Jersey Property Tax Reimbursement ("Senior Freeze") Application (Form PTR-1)

Filing Deadline Extended to ➔ October 17, 2016 ←

NOTE: The amount appropriated for property tax relief programs in the Fiscal Year 2017 State Budget affected reimbursement payments for 2015. Applicants filing Form PTR-1 will be eligible for reimbursement payments for 2015 if their income did not exceed \$85,553 for 2014 and \$70,000 for 2015 (the original limit was \$87,007), provided they met all the other program requirements. (See "Qualifications" on page 1 of the Form PTR-1 instruction booklet.)

Residents whose 2015 income was over \$70,000 but not over \$87,007 will not receive reimbursements for 2015, even if they met all the other program requirements. The Division of Taxation will notify those applicants that they are not eligible to receive reimbursement payments for 2015. Those residents can establish their eligibility for benefits in future years by filing an application by the due date. This also ensures that the Division will mail them applications for 2016.

FOR INFORMATION:

Visit the Division of Taxation Website:

Call the Property Tax Reimbursement Hotline:

www.njtaxation.org

1-800-882-6597



↓ You must enter your social security number below ↓

For Privacy Act Notification, See Instructions	Your Social Security Number <input type="text"/> <input type="text"/>	Last Name, First Name and Initial (Joint applicants enter first name and initial of each. Enter spouse/CU partner last name ONLY if different)		
	Spouse's/CU Partner's Social Security Number <input type="text"/> <input type="text"/>	Home Address (Number and Street, including apartment number or rural route)		
	County/Municipality Code (See instructions) <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/>	City, Town, Post Office	State	Zip Code

Place label on form if all preprinted information is correct. Otherwise, print or type your name and address.

This is a three-page application. You must complete all three pages. Fill in ovals completely.

MARITAL/CIVIL UNION STATUS

- 1. Your Marital/Civil Union Status on December 31, 2014: ← Single ← Married/CU Couple
- 2. Your Marital/Civil Union Status on December 31, 2015: ← Single ← Married/CU Couple

AGE/DISABILITY STATUS

- 3a. On December 31, 2014, were you age 65 or older?

Yourself	<input type="radio"/> ← Yes	<input type="radio"/> ← No
Spouse/CU Partner	<input type="radio"/> ← Yes	<input type="radio"/> ← No
- 3b. On or before December 31, 2014, were you actually receiving Federal Social Security disability benefit payments?

Yourself	<input type="radio"/> ← Yes	<input type="radio"/> ← No
Spouse/CU Partner	<input type="radio"/> ← Yes	<input type="radio"/> ← No
- 4a. On December 31, 2015, were you age 65 or older?

Yourself	<input type="radio"/> ← Yes	<input type="radio"/> ← No
Spouse/CU Partner	<input type="radio"/> ← Yes	<input type="radio"/> ← No
- 4b. On or before December 31, 2015, were you actually receiving Federal Social Security disability benefit payments?

Yourself	<input type="radio"/> ← Yes	<input type="radio"/> ← No
Spouse/CU Partner	<input type="radio"/> ← Yes	<input type="radio"/> ← No

Applicant(s) must meet the age or disability requirements **for both 2014 and 2015**. If neither you nor your spouse/CU partner met the requirements, you are not eligible for the reimbursement, and you should not file this application. See "Eligibility Requirements" on page 1 of instructions.

PROOF OF AGE OR DISABILITY FOR 2014 AND 2015 MUST BE SUBMITTED WITH APPLICATION

Age 65 or Older: Copy of one – Birth Certificate, Driver's License, Church Records
Receiving Federal Social Security Disability Benefits: Copy of Social Security Award Letter
 See instructions for more information.

RESIDENCY REQUIREMENTS

- 5. Have you lived in New Jersey continuously since December 31, 2004, or earlier as either a homeowner or a renter? ← Yes ← No
If "No," STOP. You are not eligible for the reimbursement, and you should not file this application.
- 6. Have you owned and lived in the same New Jersey home since December 31, 2011, or earlier? (Mobile Home Owners, see instructions) ← Yes ← No
If "No," STOP. You are not eligible for the reimbursement, and you should not file this application.



Name(s) as shown on PTR-1

Your Social Security Number

DETERMINING TOTAL INCOME: LINES 7 and 8: Enter your annual income for 2014 and 2015. See "Income Standards" and "Determining Total Income" in the instructions for information on possible sources of income and how to determine the amount to be reported in each category. If you had no income in a particular category, leave that line blank. Losses in one category of income cannot be used to reduce total income. **If you have a net loss in any income category, leave that line blank.** If you were married or in a civil union as of December 31 of either 2014 or 2015, and living in the same household, combine your incomes for that year. If you lived in separate households, file as "single."

INCOME CATEGORIES	2014		2015	
a. Social Security Benefits (including Medicare Part B premiums) paid to or on behalf of applicant. Enter total amount from Box 5 of Form SSA-1099 or Form RRB-1099				
b. Pension and Retirement Benefits (including IRA and annuity income) See instructions for calculating amount.				
c. Salaries, Wages, Bonuses, Commissions, and Fees				
d. Unemployment Benefits				
e. Disability Benefits, whether public or private (including veterans' and black lung benefits).				
f. Interest (taxable and exempt).				
g. Dividends				
h. Capital Gains				
i. Net Rental Income				
j. Net Profits From Business				
k. Net Distributive Share of Partnership Income				
l. Net Pro Rata Share of S Corporation Income				
m. Support Payments				
n. Inheritances, Bequests, and Death Benefits				
o. Royalties				
p. Gambling and Lottery Winnings (including New Jersey Lottery)				
q. All Other Income				
Add lines a-q in each column. Enter total 2014 income on Line 7 and total 2015 income on Line 8.	<div style="border: 1px solid black; display: inline-block; padding: 2px;"> , </div> 7. TOTAL 2014 INCOME		<div style="border: 1px solid black; display: inline-block; padding: 2px;"> , </div> 8. TOTAL 2015 INCOME	

Total annual income cannot → exceed amounts shown.

Was your total 2014 income on Line 7 \$85,553* or less?

Yes. See 2015 income eligibility.

No. STOP. You are not eligible for the reimbursement, and you should not file this application.

*Subject to change. See "Impact of State Budget" on page 1 of instructions.

Was your total 2015 income on Line 8 \$87,007* or less?

Yes. Go to page 3.

No. STOP. You are not eligible for the reimbursement, and you should not file this application.

*Subject to change. See "Impact of State Budget" on page 1 of instructions.



Name(s) as shown on PTR-1

Your Social Security Number

PRINCIPAL RESIDENCE

9. Status (fill in appropriate oval): ← Homeowner ← Mobile Home Owner

10. Homeowners: Enter the block and lot numbers of your 2015 principal residence.

Block [][][][][] . [][][][][] Lot [][][][][] . [][][][][] Qualifier [][][][][]

11a. Did you share ownership of this property with anyone other than your spouse/CU partner? (Mobile Home Owners, see instructions) ... Yes No 2014 | 2015 Yes No

11b. If you answered "Yes," indicate the share (percentage) of the property owned by you (and your spouse/CU partner) (Mobile Home Owners, see instructions) ... [][] % 2014 | [][] % 2015

12a. Did this property consist of multiple units? ... Yes No 2014 | Yes No 2015

12b. If you answered "Yes," indicate the share (percentage) of the property that you (and your spouse/CU partner) used as your principal residence. ... [][] % 2014 | [][] % 2015

See instructions before completing Lines 13 and 14 if you:

- Answered "Yes" at Line 11a or Line 12a; or
• Received any deduction(s) and/or credit(s) on your property tax bills.

PROPERTY TAXES

Proof of Property Taxes Due and Paid for 2014 and 2015 Must be Submitted With Application. See instructions.

13. Enter your total 2015 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). ... 13. [][][][] , [][][][][] . [][][]

14. Enter your total 2014 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. [][][][] , [][][][][] . [][][]

REIMBURSEMENT AMOUNT (See "Impact of State Budget" on page 1 of instructions.)

15. Reimbursement. (Amount to be sent to you. Subtract Line 14 from Line 13) ... 15. [][][][] , [][][][][] . [][][]

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

Signature section with fields for Your Signature, Date, Spouse's/CU Partner's Signature, Paid Preparer's Signature, Firm's Name, Federal Identification Number, and Federal Employer Identification Number. Includes Due Date: June 1, 2016 and NJ Division of Taxation contact info.