

Town of Tuftonboro
240 Middle Road, PO Box 98
Center Tuftonboro, NH 03816

ELDERLY TAX EXEMPTION QUALIFICATION
RSA 72:39-a

This worksheet is to be completed and submitted along with completed Form PA-29, Permanent Application for Property Tax Credit/Exemptions. All information supplied will be treated confidentially and any supporting documents will be returned upon approval or denial of the application. Please note the following **Income and Asset Limits** when considering submission of your application:

INCOME LIMITS: Single [**\$24,000**] Married [**\$36,000**]

ASSET LIMIT: Single [**\$52,500**] Married [**\$52,500**]

If you hold a life estate in the property or your property is owned by a trust, you must submit a completed form PA33 (Statement of Qualification) **and** submit a copy of the deed showing the assigned ownership of the life estate **or** a copy of the Declaration of Trust, including a list of beneficiaries

Please print all information clearly:

Applicant's Name: _____

Spouse's Name: _____

Property Address: _____

Mailing Address: _____

EXEMPTION AMOUNTS

65 to 74 - \$20,000

75 to 79 - \$40,000.00

80+ \$60,000.00

INCOME:

Please list the source and amount of all income for year for both you and your spouse, if applicable.

SOURCE: (Net income)	OWNER #1:	OWNER #2:
Date of Birth:	_____	_____
Social Security:	\$ _____	\$ _____
Pension & Retirement	\$ _____	\$ _____
Wages:	\$ _____	\$ _____
Rental Income:	\$ _____	\$ _____
Other Income/Annuities:	\$ _____	\$ _____
Interest Income:	\$ _____	\$ _____
TOTAL INCOME:	\$ _____	\$ _____

If applicable, please provide a copy of the following:

1. Interest and Dividend tax return to the State of NH
2. Federal Income Tax Form(s)
3. Saving & Checking Bank Statements (Jan. to Dec. of applicable tax year)
4. W2's, 1099, 1099-SSA Benefits
5. Annuity Policies
6. Driver's License
7. Marriage License
8. Property Liability Insurance Policy

Pursuant to RSA 72:34 assessing officials may request additional documentation to verify eligibility.

ASSETS:

Please list all assets owned (Self & Spouse)

Savings Accounts or Investments/Certificates: (CD's, Stocks & Bonds, IRA's, Annuities, Travel Trailers, Boats, Antiques, Cars etc.)

<u>INSTITUTION NAME:</u>	<u>TYPE:</u>	<u>VALUE/AMOUNT</u>
_____	Checking _____	_____
_____	Savings _____	_____
_____	Savings _____	_____
_____	IRA _____	_____
_____	Other _____	_____

VEHICLES:

- A. Make / Model / Year / Mileage _____
Est. Value \$ _____
- B. Make / Model / Year / Mileage _____
Est. Value \$ _____
- C. Boat / Model / Year _____ Est. Value \$ _____
- D. RV / Model / Year _____ Est. Value \$ _____
- E. Other /Description _____ Est. Value \$ _____

REAL ESTATE: (not including your primary residence)

Property Type _____ In Town/State _____
 **Provide copy of tax bill.
 Est. Value \$ _____

TOTAL ASSETS \$ _____

*** Note: Complete applications received by APRIL 15th will be reflected on the June Tax bill.

I swear, under penalty of perjury, that all the above is a correct and accurate accounting of my financial condition to the best of my knowledge. I further authorize any agency or financial institution to release information about me or copies of my records to any agent of the Town of Tufonboro. I release all persons whomsoever from any liability resulting from the release of this information.

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

TELEPHONE NUMBER: _____

PLEASE RETURN THIS QUESTIONNAIRE BY APRIL 15TH, THANK YOU.