

City of Dover Application for Elderly Exemption (RSA 72:39a)

DEADLINE TO FILE THIS APPLICATION IS 4/15/2018

Effective for the December 1, 2018 tax bill

1. Personal Information

a. Applicant's Name(s) _____ Telephone # _____

b. Mailing address _____
 The property must be your principal place of abode. Is it? Yes _____ No _____
 The exemption cannot be claimed in more than one community. You cannot receive similar benefits elsewhere, such as Florida Homestead exemption

c. Marital Status: Married _____ (#yrs _____) Single _____ Widow(er) _____

If the spouse owns the real estate the couple must have been married for 5 years.

d. Residence Owned: Solely _____ With Spouse _____ *With Others _____

Irrevocable Trust (usually does not qualify) _____ Revocable Trust _____

*Joint Tenants _____ *Tenants in Common _____ Life Estate _____

e. Number of years owned residence _____

f. I have been a legal resident of N H for the past three years or since 4/1/2015 yes ___ No ___

g. Age _____ Date of birth ___/___/_____ Spouses date of birth: ___/___/_____

h. Do you own real estate other than your occupied NH residence? Yes ___ No _____
 (If yes, please attach copy of tax bill)

i. Do you have a life estate in any other properties? Yes _____ No _____

j. If the property is held in a Trust a Statement of Qualification (PA-33) must be filled out. Please call this office for a form & instructions

2 Income Information List gross yearly income from all sources. Submit 2017 year-end statements verifying amounts entered

	YEARLY GROSS AMOUNTS	
	APPLICANT	SPOUSE
a. Social Security (before deductions)	\$ _____	\$ _____
b. Pension & Retirement (before deductions)	\$ _____	\$ _____
c. Wages (before deductions)	\$ _____	\$ _____
d. Rental Income (before costs & expenses)	\$ _____	\$ _____
e. Interest & or Dividend Income	\$ _____	\$ _____
f. Other Income (Specify source)	\$ _____	\$ _____
examples = Business, unemployment, government assistance, alimony, settlements		
g. Gain from the sale of an asset (stocks, real estate etc)	\$ _____	\$ _____

LIMITS	\$38,000 Single, \$52,000 Married	Total Income _____
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Please check the following that applies to you:
 Are you required to file an IRS tax return? YES _____ If yes, please provide a copy of your 2017 federal income tax return including all schedules and pages. NO _____ If no, we may request IRS form 4506-T in order to confirm no filing is required.

Are you required to file an interest and dividend tax return to the State of NH?

YES ___ NO ___ If yes, please provide a copy of your 2017 return.

3. Asset Information

a. Type of property for which exemption is being claimed: Single family _____
Multi family _____

b. If multi family, in which unit do you reside? _____

c. List value (December 31, 2017) of all assets owned (self & spouse), tangible or intangible (certificates of deposit, stocks, bonds, IRA, money market, mutual funds, etc.) Please list the market value.

**YOU MUST SUBMIT VERIFICATION OF THESE AMOUNTS.
ENCLOSE 2017 YEAR-END MONTHLY BALANCE STATEMENTS SHOWING ALL DEBITS &
CREDITS.**

- Type ___ CD _____ Institution _____ Value \$ _____
- Type ___ Stocks _____ Institution _____ Value \$ _____
- Type ___ Bonds _____ Institution _____ Value \$ _____
- Type ___ IRA _____ Institution _____ Value \$ _____
- Type ___ Annuity (other) _____ Institution _____ Value \$ _____

d. List current balances of all banking and savings accounts in you and/or your spouses name,

**YOU MUST SUBMIT COPIES OF YOUR 2017 MONTHLY YEAR-END BANK
STATEMENTS SHOWING ALL DEBITS & CREDITS.**

- Savings accounts: Institution _____ Balance \$ _____
- Checking account: Institution _____ Balance \$ _____
- Other accounts (Specify) Institution _____ Balance \$ _____
- Money Market Accounts Institution _____ Balance \$ _____

e. Estimated value of furniture, jewelry, furs, antiques, etc: \$ _____ **(MUST BE COMPLETED) Anything that can be sold for cash is an asset**

f. **Vehicles:** Please provide the following info: (cars, trucks, boats, trailers, Rv's, snowmobiles etc)

The best estimation is to either call a car dealer or use the RETAIL value in the Kelley Blue Book

- Car make _____ Model _____ Year _____ Mileage _____
- 4 Door _____ 2 Door _____ Est. Value \$ _____
- Car make _____ Model _____ Year _____ Mileage _____
- 4 Door _____ 2 Door _____ Est. Value \$ _____
- Boat (other) make _____ Model _____ Year _____ Mileage _____
Est. Value \$ _____

g. Real Estate: **Other than your principal place of abode Dover NH residence,** please submit copies of your recent tax bill & provide the following information:

- Property type _____ Town & State _____ Est. Value \$ _____

TOTAL ASSETS: \$155,000 Limit \$ _____ I
swear, under the penalty of perjury, that all the above is a correct and accurate accounting of my financial condition. SIGNATURE _____ DATE _____

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.