2009

New Jersey Property Tax Reimbursement

Filing Deadline Extended to



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



STATE OF NEW JERSEY 2009 PROPERTY TAX REIMBURSEMENT APPLICATION

| | You must enter your social security number below Your Social Security Number Last Name, First | t Name and Initial (Joint ap | unlicente enter first name and initia | Lof cook Enter | anauga/CLL partner leat non | oo ONIIV T Ø |
|---|--|------------------------------|---------------------------------------|-------------------|--|--|
| cation, | Last Name, 1 iis | if differen | | i oi each - Enter | spouse/CO partner last nan | Place label on form if all preprinted information is correct. Otherwise, print or type your name and address |
| Notific | Spouse's/CU Partner's Social Security Number Home Address (| Number and Street, inclu | uding apartment number | or rural rout | ie) | if all p |
| For Privacy Act Notification, See Instructions | | | | | | on form is corre your nar |
| or Pri | County/Municipality Code (See Table page 10) City, Town, Post | Office | State | | Zip Code | label mation |
| L | | | | | | Place infor |
| 1. | Residency Status: | Mobile Home Own | ner | | | |
| 2. | | _ | Married/CU Couple | | | |
| 3. | Your Marital/Civil Union Status on December 31, 2009: | Single N | Married/CU Couple | | | |
| | On December 31, 2008, I (or my spouse/CU partner) was | | • | | • | - |
| 4b. | On December 31, 2009, I (or my spouse/CU partner) was | | | | | |
| | You must provide proof that the age or disability requirements of proof. If you (or your spouse/CU partner) did not meet the age you should not file this application. | or disability require | ements, you are no | ot eligible | for the reimburs | sement and |
| | Did you live in New Jersey continuously since before January STOP. You are not eligible for the reimbursement and you sho | ould not file this app | olication. | | _ | If "No," |
| 6. | Did you own and live in your New Jersey home (or lease a site manufactured or mobile home that you own) since before Janu reimbursement and you should not file this application. | | | | | ble for the |
| 7. | Complete Income Worksheet A (on reverse) and enter the amore from Line r. | | ncome 7. | | | |
| 8. | Complete Income Worksheet B (on reverse) and enter the amoretem Line r. | | ncome 8. | | | |
| 9. | Enter the address for which you are claiming the reimbursement Street address | | a bove. Municipality | | | |
| 10. | Homeowners: Enter the block and lot numbers of the residence | e for which the pro | perty tax reimburse | ement is b | eing claimed. | |
| | Block Lot | | | Qualifier | | |
| 11a. | Did you share ownership of your principal residence with anyon other than your spouse/CU partner? (Mobile Home Owners see | | 2008 | No | 2009 | No |
| 11b. | If you answered "Yes," indicate the share (percentage) of the p owned by you (and your spouse/CU partner) (Mobile Home Ow | roperty | | % | | % |
| 122 | Does your principal residence consist of more than one unit? . | | · | No | Yes | No |
| | If you answered "Yes," indicate the share (percentage) of the p | | | | | |
| 120 | that you (and your spouse/CU partner) occupy as your principa | | | % | , , , , , , , , , , , , , , , , , , , | % |
| lf : | you answered "Yes" at Line 11a or Line 12a, be sure to read | the instructions o | on pages 8-9 befor | re you co | mplete Lines | 13 and 14. |
| 13. | Enter your total 2009 property taxes due and paid on your princ Mobile Home Owners, property taxes are your total site fees pa | | | D ,[| | |
| 14. | Enter your total 2008 property taxes due and paid on your princ Mobile Home Owners, property taxes are your total site fees pa | | | \Box . | $\overline{}$ | |
| | REIMBURSEMENT AMOUNT 15. Subtract Line 14 from Line 13 | | 15. | | | |
| ┞ | If Line 15 is zero or less, you are not eligible for a property | y tax reimbursemer | nt and you should r | not file this | s application. | |
| | Division Use 1 2 3 | | 5 6 | 1 | | |
| | Under the penalties of perjury, I declare that I have examined this Property Tax Reim and statements, and to the best of my knowledge and belief, it is true, correct, and confectaration is based on all information of which the preparer has any knowledge. | | | licant, this | Due Date: June 1, Mail your complete application to: | |
| 1 60 | | U Partner's Signature (if | applying iointly. BOTH n | | NJ Division of Tax Revenue Process | |
| SIGN F | Paid Preparer's Signature Federal Identification Number Property Tax Reimble PO Box 635 Trenton, NJ 08646- | | | | | mbursement |
| | Firm's Name | Federal Employe | er Identification Number | er | Property Tax Reimb | oursement |

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 | | | |
|-----|---|-------------|--|--|
| b. | Total Pension Income | | | |
| c. | Salaries and Wages | c | | |
| d. | Bonuses, Commissions & Fees | d | | |
| e. | Unemployment Benefits | е | | |
| f. | Disability Benefits (including veterans' and black lung benefits) | 1 | | |
| g. | Interest (taxable & exempt) | 9 | | |
| h. | Dividends | h | | |
| i. | Net Capital Gains | | | |
| j. | Net Rental Income | j | | |
| k. | Net Business Income | k | | |
| l. | Support Payments | | | |
| m. | Inheritances | m | | |
| n. | Royalties | n | | |
| 0. | Gambling & Lottery Winnings (including New Jersey) | | | |
| p. | Bequests and Death Benefits | р | | |
| q. | All Other Income | q | | |
| r. | TOTAL | | | |
| COI | as your total 2008 income \$70,000 or less? You must report mbined income of both spouses/CU partners if your status at the 2 of the application was "Married/CU Couple." | v c L | | |
| | 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. | | | |
| | | - 1 | | |

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.

| П | |
|---|---|
| | a. Social Security Benefits (including Medicare Part B premiums) |
| | b. Total Pension 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 |
| | I. 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." |
| | Vec Enter the total amount on Line 2 and continue |

- 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.