

TOWN OF HAMPSTEAD
11 Main St. Hampstead, NH 03841

ELDERLY TAX EXEMPTION QUALIFICATION WORKSHEET

RSA 72:33, VI allows Selectmen or Assessing Officials to require those receiving tax exemptions to re-file their qualifying information periodically but no more frequently than annually. Failure to file such periodic statements may, at the discretion of the Assessing Officials, result in a loss of the exemption for that year.

This worksheet is to be completed and submitted along with **all supporting documentation**. 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 \$40,000	Married \$70,000
ASSET LIMITS:	Single \$100,000	Married \$100,000

If you hold a **Life Estate** in the property or your property is owned by a **Trust**, you must also submit a completed form PA-33 (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 **or** a completed Certification of Trust per RSA 564-B: 10-1013.

Please print all information clearly.

Please check one: **New App.** _____ **Existing App.** _____

Applicant's Name: _____

Age: _____ **Date of Birth:** _____

Spouse's Name: _____

Age: _____ **Date of Birth:** _____

Property Address: _____

Mailing Address: _____

Date of Residency: _____

INCOME:

Please list the amount of all income for the year for both you and your spouse.

SOURCE:	APPLICANT:	SPOUSE:
Social Security:	\$ _____	\$ _____
Pension & Retirement:	\$ _____	\$ _____
Wages:	\$ _____	\$ _____
Rental Income:	\$ _____	\$ _____
Interest Income:	\$ _____	\$ _____
Other Income: Annuities, IRA Distributions, Dividends, Etc.	\$ _____	\$ _____
TOTAL INCOME:	\$ _____	\$ _____

Please provide all Form 1099's for Social Security income and the other incomes shown above.

If you have filed any of the following – please provide a copy.

- 1. Interest and Dividend tax return to the State of NH**
- 2. Federal Income Tax Form**
- 3. Any other documents as needed to verify eligibility**

Check here if the applicant or the applicants spouse **was not required** to file a Federal Income Tax Return: _____

ASSETS:

Please list all assets owned (Self & Spouse) and provide statements showing the value of each asset as of December 31 of the tax year.

Checking, 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	_____
_____	CD	_____
_____	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 and up to the greater of 2 acres or the minimum single family residential lot size specified in the local zoning ordinance.)

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

TOTAL OF ALL ASSETS \$ _____

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 and that this is my primary place of abode per RSA 79:39-a(c). 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 Hampstead**. I release all persons whomsoever from any liability resulting from the release of this information.

APPLICANT'S
SIGNATURE: _____ **DATE:** _____

PRINTED NAME: _____

SPOUSE'S
SIGNATURE: _____ **DATE:** _____

PRINTED NAME: _____

TELEPHONE NUMBER: _____

PLEASE RETURN THIS APPLICATION AND ALL SUPPORTING
DOCUMENTATION BY APRIL 15th OF THE QUALIFYING TAX YEAR

*****Note: Completed and approved applications received by APRIL 15th will be reflected on the July tax bill.**