

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

**DEADLINE TO FILE THIS APPLICATION IS 4/15/2015**

**Effective for the December 1, 2015 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 \_\_\_\_\_  
 \*Joint Tenants \_\_\_\_\_ \*Tenants in Common \_\_\_\_\_

e. Number of years owned residence \_\_\_\_\_

f. I have been a legal resident of N H for the past three years or since 4/1/2012 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 2014 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		
g. Gain from the sale of an asset (stocks, real estate etc)	\$ _____	\$ _____

<b>LIMITS</b> \$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 \_\_\_\_\_ NO \_\_\_\_\_ If yes, please provide a copy of your 2014 federal income tax return including all schedules.

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 2014 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, 2014) 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 2014 YEAR-END BALANCE STATEMENTS.**

▪ 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 2014 YEAR-END BANK STATEMENTS.**

▪ 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 occupied 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.