

2012



Property Tax Deferral Application for

61 or younger and disabled or 62 or older
(ORS 311.666-701)

For official use only	
Date received at county	Date received at Revenue
2011-12 Net property taxes	
2011-12 Real market values	

Notice:

- **All new applicants:** You must attach a copy of your 2011-12 property tax statement. You must complete the Household Income and Asset Worksheet on the back of this application.
- **Individuals with disabilities:** You must be determined to be eligible to receive or be receiving federal Social Security disability benefits on or before April 15 of the year in which the claim is filed, **attach proof of your eligibility (we will not accept your 1099 SSA statement or New Benefit statement).**
- **Remember to sign and date your application.**
- **File your completed application with the county assessor's office after January 1 and on or before April 15.**

Applicant section

Type of applicant						
<input type="checkbox"/> Individual		<input type="checkbox"/> Joint		<input type="checkbox"/> RDP		
<input type="checkbox"/> Refiling as surviving spouse		<input type="checkbox"/> New marriage		<input type="checkbox"/> Divorce		
Applicant's name (last, first, MI)		Social Security number	Birth date	Age on April 15	Are you disabled?	
●		● - -	●	●	● <input type="checkbox"/> Yes <input type="checkbox"/> No	
Joint applicant's name (last, first, MI)		Social Security number	Birth date	Age on April 15	Are you disabled?	
●		● - -	●	●	● <input type="checkbox"/> Yes <input type="checkbox"/> No	
Mailing address			Property address (if different than mailing address)			
●						
City		State	ZIP code	Telephone/message no. ()	E-mail for program updates/contact	
● Manufactured Structure (Mobile Home)	Model year	Make		Home number	Square footage	# of bedrooms
	# of bathrooms	Roofing material	Siding type	Heating system	Cooling system	

How many years have you owned and lived in the home as of April 15, 2012?

If your answer to the above question is less than five years, **STOP HERE.** You do not qualify for the Deferral Program.

Do you have a reverse mortgage that is secured by this home? Yes No

If your answer to the above question is yes, **STOP HERE.** You do not qualify for the Deferral Program.

Is the home insured for fire and other casualty? Yes No

If your answer to the above question is no, **STOP HERE.** You do not qualify for the Deferral Program.

Insurance carrier

Policy number	Coverage amount \$
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Do you owe prior years' property taxes? Yes No (See Delay of Foreclosure application)

NOW GO TO THE WORKSHEET PAGE →

County section (Do not complete. This section will be completed by the county assessor's office.)

Platted	LOT _____ BLK _____ _____ Legal Desc				
Unplatted	For all unplatted properties attach a copy of the recorded deed or contract.				
	Parcel in: T _____ R _____ SEC _____				
Deed	As described in _____ County Containing _____ acres				
	Deed information				
	<input type="checkbox"/> Deed recorded in (year) _____ <input type="checkbox"/> Contract recorded in (year) _____				
Assessor's Certification	Document/instrument number	Microfilm number	Reel	Book/volume	Page
	Assessor's account number			Levy code	
	<input type="checkbox"/> Check here for split levy code	Assessor's account number			Levy code
	Type of residential property described above		If a multi-family building, or business on the property, give percentage of value allocated to the applicant's unit (percent to be deferred): ● _____ %		
<input type="checkbox"/> Single family <input type="checkbox"/> Multi-family					
Assessor's (or Assessor's designee's) signature verifying applicant is the owner of record			Date	County Number	
X					

– This space for Department of Revenue use only –

<input type="checkbox"/> Application approved	Approved by (initials)	Date approved	<input type="checkbox"/> Application denied	Denied by (initials)	Date denied
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Applicant's last name	First name and initial	Social Security number - -
Joint applicant's last name	First name and initial	Social Security number - -

This section must be completed. List your yearly household income for 2011. Include income earned in other states or countries. Your income eligibility is determined by Oregon law (ORS 311.668). Your household income must be less than \$40,500 (taxable and nontaxable income) to qualify for the 2012–2013 property tax year.

Household income worksheet

1. Wages, salaries, and other pay for work.....	1	<input type="text"/>	<input type="text" value="00"/>
2. Interest and dividends (total taxable and nontaxable).....	2	<input type="text"/>	<input type="text" value="00"/>
3. Business net income (loss limited to \$1,000).....	3	<input type="text"/>	<input type="text" value="00"/>
a. Do you have a business located on this property? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Percentage of property used for business purposes _____%			
4. Farm net income (loss limited to \$1,000).....	4	<input type="text"/>	<input type="text" value="00"/>
Do you have a farm located on this property: <input type="checkbox"/> Yes <input type="checkbox"/> No			
Percentage of property used for farm? _____%			
5. Total gain on property sales (loss limited to \$1,000).....	5	<input type="text"/>	<input type="text" value="00"/>
6. Rental net income (loss limited to \$1,000).....	6	<input type="text"/>	<input type="text" value="00"/>
a. Is part of your property used as a rental? <input type="checkbox"/> Yes <input type="checkbox"/> No			
Percentage of property used as a rental? _____%			
7. Other capital gains (i.e., stocks and bonds (loss limited to \$1,000)	7	<input type="text"/>	<input type="text" value="00"/>
8. Total Social Security, Supplemental Security Income (SSI), and railroad retirement before medicare premium deductions.....	8	<input type="text"/>	<input type="text" value="00"/>
9. Pensions and annuities before health insurance premium deductions. (total taxable and nontaxable).....	9	<input type="text"/>	<input type="text" value="00"/>
10. Unemployment benefits.....	10	<input type="text"/>	<input type="text" value="00"/>
11. Child support	11	<input type="text"/>	<input type="text" value="00"/>
12. Veteran's and military benefits	12	<input type="text"/>	<input type="text" value="00"/>
13. Gambling winnings.....	13	<input type="text"/>	<input type="text" value="00"/>
14. All other sources. Identify: _____	14	<input type="text"/>	<input type="text" value="00"/>
15. Your total household income. Add lines 1-14.....	• 15	<input type="text"/>	<input type="text" value="00"/>

If your household income on line 15 is more than \$40,500, **STOP HERE.** You do not qualify for the Deferral Program.

List the total net worth of all applicants. Net worth means the sum of the current market value of all assets including real property, cash, savings accounts, bonds, and other investments after deducting outstanding liabilities.

Net worth doesn't include the value of the homestead for which deferral is claimed, the cash value of life insurance policies on the life of an applicant, or tangible personal property owned by an applicant (e.g., furniture, vehicles).

Asset worksheet (\$500,000 limit)

1. Cash, savings, and checking account balances as of Dec. 31, 2011 ..	• 1	<input type="text"/>	<input type="text" value="00"/>
2. Amount of investments in qualified retirement plans and individual retirement accounts as of Dec. 31, 2011.....	• 2	<input type="text"/>	<input type="text" value="00"/>
3. Net worth of investments as of Dec. 31, 2011..... (Net worth means current value minus debt. Investments include real estate, trust funds, stocks, stock options, bonds, other securities, commodities, etc.)	• 3	<input type="text"/>	<input type="text" value="00"/>
4. Your total assets. Add lines 1-3	• 4	<input type="text"/>	<input type="text" value="00"/>

If your total assets on line 4 exceed \$500,000, **STOP HERE.** You do not qualify for the Deferral Program.

Declaration

I declare under penalties for false swearing that I have examined all documents and to the best of my knowledge, they are true, correct, and complete (ORS 311.666-701). I understand a lien will be placed on this property and I will be charged lien recording and/or security interest fees. I understand that 6 percent compound interest accrues on each years' deferred tax amount (ORS.305.990).

Applicant's signature X	Date	Joint applicant's signature X	Date
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