## INSERT 2012

**New Jersey Property Tax Reimbursement** ("Senior Freeze") Application (Form PTR-1)

# Filing Deadline Extended to → September 16, 2013 ←

NOTE: Under the terms of the State Budget for fiscal year 2014, only those applicants filing Form PTR-1 whose income for 2011 (their base year) did not exceed \$80,000 and whose income for 2012 did not exceed \$70,000 (the original limit was \$82,880) will be eligible to receive a reimbursement payment for 2012, provided they met all the other program requirements. (See "Qualifications" on page 1 of the Form PTR-1 instruction booklet.)

Residents whose 2012 income was over \$70,000 but not over \$82,880 will not receive reimbursements for 2012, even if they met all the other program requirements. The Division of Taxation will send notices to these applicants advising them that they are not eligible to receive reimbursement payments for 2012. However, by filing a 2012 Form PTR-1 by the due date, these residents can establish their eligibility for benefits in future years and ensure they will be mailed an application for 2013.

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

<b>Ψ</b> Yo	2012 PROI ou must enter your social security number below ♥	PERTY TAX REIMBU	JRSEMENT AF	PLICATION						
	Your Social Security Number Last Name, First N	ame and Initial (Joint applicants	enter first name and initi	ial of each.						
tion,		Enter spouse/CU partner last name ONLY if different)								
Notifica ctions	Spouse's/CU Partner's Social Security Number   Home Address (Number and Street, including apartment number or rural route)									
cy Act lnstru				on forn						
For Privacy Act Notification, See Instructions	County/Municipality Code (See instructions) City, Town, Post Of	fice St	ate Zip	Code e e e e e e e e e e e e e e e e e e						
ιĽ				Place						
	This is a four-page application. You must compl	ete all four pages. F	ill in ovals co	mpletely.						
MARITAL/CIVIL UNION STATUS  1. Your Marital/Civil Union Status on December 31, 2011:										
0	Vana Marital/Oi il Hairo Otatos an Baranda 94, 9949		/ Mauric							
	Your Marital/Civil Union Status on December 31, 2012:	<b>○</b> ← Single	<b>○</b> ← Marrie	a/CU Couple						
	E/DISABILITY STATUS									
За.	On December 31, 2011, were you age 65 or older?	Yourself Spouse/CU Partner		No     No						
		Spouse/Co Faither	C les	OF NO						
3b.	, ,	Yourself		<b>○</b> ← No						
	Federal Social Security Disability Benefits?	Spouse/CU Partner		No						
4a.	On December 31, 2012, were you age 65 or older?	Yourself		<b>○</b> ← No						
		Spouse/CU Partner		<b>○</b> ← No						
4h	On December 31, 2012, were you receiving	Yourself		<b>○</b> ← No						
τυ.	Federal Social Security Disability Benefits?	Spouse/CU Partner	← Yes	O ← No						
Applicant(s) must meet the age or disability requirements <b>for both 2011 and 2012</b> . If neither you nor your spouse/CU partner met the requirements, you are not eligible for the reimbursement and you should not file this application. See "Qualifications" on page 1 of instructions.										
	. •	2 MIIST RE SIIRMITT	ED WITH ADDI	ICATION						
	PROOF OF AGE OR DISABILITY FOR 2011 AND 2012 MUST BE SUBMITTED WITH APPLICATION  Age 65 or Older: Copy of Birth Certificate, Driver's License, Church Records									
	Receiving Federal Social Security Disability Benefits: Copy of Social Security Award Letter									
	See instructions for more information.									
RESIDENCY REQUIREMENTS  5. Have you lived in New Jersey continuously since December 31, 2001, or earlier as either a homeowner or a renter?   ☐ ← Yes ← No If "No," STOP. You are not eligible for the reimbursement and you should not file this application.										
e	_	-								
О.	6. Have you owned and lived in the same New Jersey home since December 31, 2008, or earlier? (Mobile Home Owners, see instructions) ← Yes ← No									
	If "No," STOP. You are not eligible for the reimbursement and you should not file this application.									





Your Social Security Number

## **DETERMINING 2011 INCOME (LINE 7)**

Enter your annual income for 2011. See "Income Standards" and "Determining Total Income" in the instructions for information on possible sources of income and how to determine the amount to be reported in each category. If you had no income in a particular category, leave that line blank. Losses in one category of income cannot be used to reduce total income. If you have a net loss in any income category, leave that blank. If you were married or in a civil union as of December 31, 2011, you must combine your income with your spouse's/CU partner's income.

	INCOME CATEGORIES	2011			
a.	Social Security Benefits (including Medicare Part B premiums) paid to or on behalf of applicant	a.			
b.	Salaries and Wages	b.			
C.	Bonuses, Commissions, and Fees	C.			
d.	Unemployment Benefits	d.			
e.	Disability Benefits, whether public or private (including veterans' and black lung benefits)	e.			
f.	Interest (taxable and exempt)	f.			
g.	Dividends	g.			
h.	Capital Gains	h.			
i.	Net Rental Income	i.			
j.	Net Profits From Business	j.			
k.	Net Distributive Share of Partnership Income	k.			
I.	Net Pro Rata Share of S Corporation Income	I.			
m.	Support Payments	m.			
n.	Inheritances	n.			
ο.	Royalties	0.			
p.	Gambling and Lottery Winnings (including New Jersey Lottery)	p.			
q.	Bequests and Death Benefits	q.			
	All Other Income	r.			
S.	Add lines a - r above. Is the amount on line s \$80,000* or less?				
	□ No. STOP. You are not eligible for the reimbursement and you should not file the application.	S.			
t.	Gross Pension and Retirement Benefits (including IRA and annuity income) from				
	Form 1099-R, Box 1	t.			
•	☐ <b>Yes</b> . Enter this amount in the boxes at Line 7 and continue to page 3.				
	□ No. Complete line v.	u.			
V.	New Jersey Pension and Retirement Benefits (including IRA and annuity income). <b>DO NOT enter amount from Line t on this line</b> . See instructions for calculating amount to report on Line v	V.			
W.	Add line s and line v. Is the amount on line w \$80,000* or less?				
	<ul> <li>☐ Yes. Enter this amount in the boxes at Line 7 and continue to page 3.</li> <li>☐ No. STOP. You are not eligible for the reimbursement and you should not file the application.</li> </ul>				
	□ No. STOP. You are not eligible for the reimbursement and you should not life the application.	W.			
7	7. Total 2011 Income	7.	,		





Your Social Security Number

## **DETERMINING 2012 INCOME (LINE 8)**

Enter your annual income for 2012. See "Income Standards" and "Determining Total Income" in the instructions for information on possible sources of income and how to determine the amount to be reported in each category. If you had no income in a particular category, leave that line blank. Losses in one category of income cannot be used to reduce total income. If you have a net loss in any income category, leave that blank. If you were married or in a civil union as of December 31, 2012, you must combine your income with your spouse's/CU partner's income.

INCOME CATEGORIES	2012			
a. Social Security Benefits (including Medicare Part B premiums) paid to or on behalf of applicant	a.			
b. Salaries and Wages	b.			
c. Bonuses, Commissions, and Fees	c.			
d. Unemployment Benefits	d.			
e. Disability Benefits, whether public or private (including veterans' and black lung benefits)	e.	_		
f. Interest (taxable and exempt)	f.			
g. Dividends	g.	_		
h. Capital Gains	h.			
i. Net Rental Income	i.			
j. Net Profits From Business	j.			
k. Net Distributive Share of Partnership Income	k.			
I. Net Pro Rata Share of S Corporation Income	I.			
m. Support Payments	m.			
n. Inheritances	n.			
o. Royalties	0.			
p. Gambling and Lottery Winnings (including New Jersey Lottery)	p.			
q. Bequests and Death Benefits	q.			
r. All Other Income	r.			
s. Add lines a - r above. Is the amount on line s \$82,880* or less?				
<ul> <li>☐ Yes. Continue to line t.</li> <li>☐ No. STOP. You are not eligible for the reimbursement and you should not file the application.</li> </ul>	s.			
t. Gross Pension and Retirement Benefits (including IRA and annuity income) from	0.			
Form 1099-R, Box 1	t.			
u. Add line s and line t. Is the amount on line u \$82,880* or less?				
<ul> <li>☐ Yes. Enter this amount in the boxes at Line 8 and continue to page 4.</li> <li>☐ No. Complete line v.</li> </ul>				
v. New Jersey Pension and Retirement Benefits (including IRA and annuity income). <b>DO NOT enter</b>	u.			
amount from Line t on this line. See instructions for calculating amount to report on Line v	V.			
w. Add line s and line v. Is the amount on line w \$82,880* or less?				
☐ Yes. Enter this amount in the boxes at Line 8 and continue to page 4.				
□ No. STOP. You are not eligible for the reimbursement and you should not file the application.	W.			
8. Total 2012 Income	8.	,		



Your Social Security Number

	PRINCIPAL RESIDENCE  9. Status (fill in appropriate oval):									
10. Homeowners: Enter the block and lot numbers of your 2012 principal residence.										
	Block Lot Qualifier								Qualifier	
								20	11	2012
11	<ul> <li>Did you share ownership of your principal r your spouse/CU partner? (Mobile Home Ov</li> </ul>				-			Yes	No	Yes No
11	11b. If you answered "Yes," indicate the share (percentage) of the property owned by you (and your spouse/CU partner) (Mobile Home Owners, see instructions)									
12	a. Does your principal residence consist of mo	ore tha	an one	e uni	t?			Yes	No	Yes No
12	12b. If you answered "Yes," indicate the share (percentage) of the property that you (and your spouse/CU partner) occupy as your principal residence.									
	See instructions before	com	pletin	g Li	nes 1	3 and '	14 if	you:		
	<ul><li>Answered "Yes" at Line</li><li>Received any deduction</li></ul>					an vour	nron	orty toy l	hille	
	· · · · · · · · · · · · · · · · · · ·	)II(S) &	ariu/or	crec	111(5)	on your	brob	erty tax i	UIIIS.	
PR	OPERTY TAXES									
	Proof of Property Taxes Due and Paid for 2011 and 2012 Must be Submitted With Application.  See instructions.									
13	. Enter your total 2012 property taxes due ar residence. (For Mobile Home Owners, pro are your total site fees paid multiplied by 0.	perty 1	taxes		·		13.		, 🔲	
14	14. Enter your total 2011 property taxes due and paid on your principal residence. (For Mobile Home Owners, property taxes are your total site fees paid multiplied by 0.18)									
REIMBURSEMENT AMOUNT (See "Impact of State Budget" on page 1 of instructions.)										
	15. Subtract Line 14 from Line 13									
lf L	If Line 15 is zero or less, you are not eligible for a reimbursement and you should not file this application.									
	Under the penalties of perjury, I declare that I have examined this Property Tax Reimbursement Application, including accompanying schedules and statements, and to the best of my knowledge and belief, it is true, correct, and complete. If prepared by a person other than applicant, this declaration is based on all information of which the preparer has any knowledge.								te: June 3, 2013 ir completed ion to:	
ERE	Your Signature Date Spouse's/CU Partner's Signature (if applying jointly, BOTH must sign)								. 1	vision of Taxation ue Processing Center
SIGN HER	If enclosing copy of death certificate for deceased applicant, fill in. (See instructions)							Prope	rty Tax Reimbursement	
SIG	Paid Preparer's Signature Federal Identification Number						PO Bo	n, NJ 08646-0635		
	rm's Name Federal Employer Identification Number							/ Tax Reimbursement 1-800-882-6597		
	Division Use 1 2 3	4		5		6	] [	7	_	
	DIVISION USE						JL	<u> </u>		