



17491601010000

For official use only	
Date received at county	Date received at Revenue
2015-16 Net property taxes	County #
2015-16 Real market values	

2016

Property Tax Deferral Application for

61 or younger and disabled or 62 or older

(ORS 311.666-701)

- You must attach a copy of your **2015-16 property tax statement**.
- You must complete the **household income and asset worksheets** on the back of this application.
- Individuals with disabilities: Attach proof of eligibility of federal Social Security Disability benefits received before April 15 (we won't 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 by April 15**.

Applicant section

Type of applicant Individual* *If individual applicant: Are you married? No Yes Spouse's name/SSN: _____
 Joint spouse Joint other Refiling as surviving spouse. Spouse's SSN/Deferral account number: _____

Applicant's name (last, first, MI)	Social Security number (SSN)	Date of birth	Age on April 15	Are you disabled?
	- -			<input type="checkbox"/> Yes <input type="checkbox"/> No

Joint applicant's name (last, first, MI) <input type="checkbox"/> Spouse <input type="checkbox"/> Other	Joint applicant's SSN	Date of birth	Age on April 15	Are you disabled?
	- -			<input type="checkbox"/> Yes <input type="checkbox"/> No

Current residence address	City	State	ZIP code

Property address (if different than residence address)	City	State	ZIP code

If property address is different than current residence address, explain why:

Phone (or message phone)	Email

If you own a **manufactured structure** (mobile home), complete this section:

Model year	Make	Home ID number	Square footage	# of bedrooms
# of bathrooms	Roofing material	Siding type	Heating system	Cooling system

1. Have you previously been approved for Property Tax Deferral on this property?..... Yes No
If yes, was this property under the program prior to 2011? Yes No
2. Does your property contain multiple units? Yes No If yes, how many units? _____
What is the purpose of the other unit(s)? _____
Describe which homestead (unit) you live in _____
3. As of April 15, 2016, how many years have you **owned** the home? _____ years
As of April 15, 2016, how many years have you **lived in** the home? _____ years
If your answer to either of the above questions is less than five years, please see instructions on page 3. If you feel you meet the criteria for the Downsizing Provision, please contact us for the Downsizing Provision worksheet.
4. Do you have a reverse mortgage that is secured by this home? Yes No
If your answer to the above question is yes and the property wasn't in the Property Tax Deferral program prior to 2011, **STOP HERE**. You don't qualify for the Property Tax Deferral program.
5. Is the home insured for fire and other casualty? Yes No
If your answer to the above question is no, **STOP HERE**. You don't qualify for the Property Tax Deferral program.
6. Is the property owned in a trust?..... Yes No
If yes, provide a copy of the trust documents.

Insurance carrier	Policy number

Do you owe prior years' property taxes? Yes (See Delay of Foreclosure application) No

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Applicant's last name	First name and MI	SSN
Joint applicant's last name	Joint applicant's first name and MI	Joint applicant's SSN

This section must be completed. List your yearly household income for 2015. Household income consists of all income of the applicant(s) and their spouse(s) that reside in the home. Include income earned in other states or countries. Your household income must be less than \$43,000 (taxable and nontaxable income) to qualify for the 2016–2017 property tax year. We may require verification of the information you provide in this section.

Household income worksheet

1. Wages, salaries, and other pay for work	1	<input type="text"/>	<input type="text"/>	00
2. Interest and dividends (total taxable and nontaxable).....	2	<input type="text"/>	<input type="text"/>	00
3. Business net income (loss limited to \$1,000)	3	<input type="text"/>	<input type="text"/>	00
4. Farm net income (loss limited to \$1,000).....	4	<input type="text"/>	<input type="text"/>	00
5. Total gain on property sales.....	5	<input type="text"/>	<input type="text"/>	00
6. Rental net income.....	6	<input type="text"/>	<input type="text"/>	00
7. Other capital gains (i.e., stocks and bonds) (loss limited to \$1,000)	7	<input type="text"/>	<input type="text"/>	00
8. Total Social Security, Supplemental Security Income (SSI), and railroad retirement before Medicare premium deductions	8	<input type="text"/>	<input type="text"/>	00
9. Pensions and annuities before health insurance premium deductions (total taxable and nontaxable).....	9	<input type="text"/>	<input type="text"/>	00
10. Unemployment benefits.....	10	<input type="text"/>	<input type="text"/>	00
11. Child support	11	<input type="text"/>	<input type="text"/>	00
12. Veteran's and military benefits	12	<input type="text"/>	<input type="text"/>	00
13. Gambling winnings	13	<input type="text"/>	<input type="text"/>	00
14. All other sources. Identify:	14	<input type="text"/>	<input type="text"/>	00
15. Your total household income. Add lines 1-14.....	• 15	<input type="text"/>	<input type="text"/>	00

If your total household income (line 15) is more than \$43,000, **STOP HERE.** You don't qualify for the Property Tax 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. We may require verification of the information you provide in this section.

Net worth doesn't include the value of the property 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, not including your home)

1. Cash, savings, and checking account balances as of Dec. 31, 2015	1	<input type="text"/>	<input type="text"/>	00
2. Amount of investments in qualified retirement plans and individual retirement accounts as of Dec. 31, 2015.....	2	<input type="text"/>	<input type="text"/>	00
3. Net worth of investments as of Dec. 31, 2015	3	<input type="text"/>	<input type="text"/>	00
(Net worth means current value minus debt. Investments include real estate, trust funds, stocks, stock options, bonds, other securities, commodities, etc.)				
4. Your total assets. Add lines 1-3.....	• 4	<input type="text"/>	<input type="text"/>	00

If your total assets on line 4 exceed \$500,000, **STOP HERE.** You don't qualify for the Property Tax 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 305.990). 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 interest accrues on each years' deferred tax amount (ORS 311.666-701).

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



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

Property description	Platted					
	● LOT _____		BLK _____		Legal desc _____	
	Unplatted For all unplatted properties attach a copy of the recorded deed or contract.					
Deed information	● Parcel in: T _____ R _____ SEC _____					
	As described in _____ County Containing _____ acres					
	Current deed information		<input type="checkbox"/> Deed recorded (date) ● _____ <input type="checkbox"/> Contract recorded (date) _____			
		Document/instrument number	Microfilm number	Reel	Book/volume Page	
Earliest deed showing ownership by the taxpayer(s)		Recorded (date) ● _____		Document/instrument number _____		
Assessor's certification	<input type="checkbox"/> Check here for split levy code		Assessor's account number ● _____		Levy code ● _____	
			Assessor's account number ● _____		Levy code ● _____	
	Property described above contains		If the property contains multiple units, what is the percentage of value allocated to the taxpayer's unit (percent to be deferred)? ● _____ %			
	<input type="checkbox"/> A single unit <input type="checkbox"/> Multi-units					
Assessor's (or Assessor's designee's) signature verifying applicant is the owner of record				Date	County number	
X						

— This space for Revenue use only —

<input type="checkbox"/> Application approved	Approved by (initials)	Date approved	<input type="checkbox"/> Application denied	Denied by (initials)	Date denied
Identified cohort					
<input type="checkbox"/> New applicant	<input type="checkbox"/> HB 4039	<input type="checkbox"/> HB 2510	<input type="checkbox"/> Reapplying, not under a house bill		