



2018

Property Tax Deferral Application (ORS 311.666-701)

Table with 2 columns: Date received at county, Date received at Revenue. Header: For official use only.

- You must attach a copy of your 2017-18 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 16.

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:

Form with fields for Applicant's name, Social Security number, Date of birth, Age on April 15, Are you disabled?, Joint applicant's name, Spouse/Other, Joint applicant's SSN, Date of birth, Age on April 15, Are you disabled?, Current residence address, City, State, ZIP code, Property address, City, State, ZIP code.

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

Form with fields for Phone (or message phone) and Email

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

Form with fields for 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, 2018, how many years have you owned the home? years
As of April 15, 2018, 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 have been on deferral and 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.
Insurance carrier Policy number
6. Is the property owned in a trust? Yes No
If yes, attach a copy of the trust documents.
7. Do you owe prior years' property taxes? Yes (See Delay of Foreclosure application) No

Go to the next page ->

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 2017. 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 \$44,000 (taxable and nontaxable income) to qualify for the 2018–2019 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" 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"/>
4. Farm net income (loss limited to \$1,000).....	4	<input type="text"/>	<input type="text" value="00"/>
5. Total gain on property sales.....	5	<input type="text"/>	<input type="text" value="00"/>
6. Rental net income.....	6	<input type="text"/>	<input type="text" value="00"/>
7. Other capital gains (such as, 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 total household income (line 15) is more than \$44,000, **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 (such as, furniture, vehicles).

Net worth asset worksheet (\$500,000 limit, not including your home)

1. Cash, savings, and checking account balances as of Dec. 31, 2017	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, 2017.....	2	<input type="text"/>	<input type="text" value="00"/>
3. Net worth of investments as of Dec. 31, 2017	3	<input type="text"/>	<input type="text" value="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" value="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 X	Date	Joint applicant's signature X	Date
-----------------------------------	------	---	------

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

Property description	Platted				
	● LOT _____ BLK _____ _____ Legal description				
	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				
Assessor's certification	Earliest deed showing ownership by the taxpayer(s) ● _____ Recorded (date) _____ Document/instrument number _____				
	<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					