

Form PTR-1A Co-op

Cooperatives

Verification of 2022 and 2023 Property Taxes

(Use blue or black ink. See instructions for completion on back.)

Part I — To Be Completed by Applicant (Part II to be completed by co-op manager)

Social Security # \_\_\_\_\_ Spouse's/CU Partner's Social Security # \_\_\_\_\_

Name \_\_\_\_\_
Last Name, First Name, and Middle Initial (Follow with first name and initial of spouse/CU partner if filing jointly. Only enter spouse/CU partner's last name if different.)

Address \_\_\_\_\_
Street City State ZIP Code

A. Did you own this property with someone who was not your spouse/CU partner? Yes No
B. If yes, indicate the share (percentage) of property that you (and your spouse/CU partner) owned. %

Part II — To Be Completed by the Co-op Manager

2022 Property Taxes

- 1. If your units are categorized by specific model types or unit descriptions, list the model type for this unit. Otherwise, leave blank.
2. Total amount of property taxes attributable to this unit (before deductions and/or credits are subtracted).....\$
3. Senior Citizen's Deduction .....\$
4. Veteran's Deduction .....\$
5. Enter amount from line 2. If applicant answered "Yes" to Question A, you must apportion the amount on line 2 when completing this line. (See instructions.) \$

2023 Property Taxes

- 1. If your units are categorized by specific model types or unit descriptions, list the model type for this unit. Otherwise, leave blank.
2. Total amount of property taxes attributable to this unit (before deductions and/or credits are subtracted).....\$
3. Senior Citizen's Deduction .....\$
4. Veteran's Deduction .....\$
5. Enter amount from line 2. If applicant answered "Yes" to Question A, you must apportion the amount on line 2 when completing this line. (See instructions.) \$

Homeowners, enter this amount on line 13 of your Form PTR-1

Homeowners, enter this amount on line 12 of your Form PTR-1

Under the penalties of perjury, I certify that I am the manager of \_\_\_\_\_ where the above co-op unit is located. I further certify that the above-stated amounts of property taxes attributable were paid for Calendar Year 2022 and 2023 and are true and accurate to the best of my knowledge.

(Name)

(Date)

(Title)

(Phone)

(If you complete this form, enclose it with your Form PTR-1 application.)

# Form PTR-1A Co-op – Instructions

## Part I – To Be Completed by Applicant

**Social Security Number.** If your marital/civil union status as of December 31, 2023, was single, enter only your Social Security number in the space provided on Form PTR-1A Co-op. If your status as of December 31, 2023, was married/CU couple, you must report both applicants' numbers in the order in which the names are listed on the application. If you were married or in a civil union but living apart from your spouse/CU partner, and you did not have access to or receive support from their income, you are considered "Single" for purposes of the Property Tax Reimbursement. You should enter only your Social Security number on Form PTR-1A Co-op.

**Name and Address.** Print or type your name (last name first) and complete address of the property for which you are claiming the reimbursement in the spaces provided. Also include your spouse's/CU partner's name if filing jointly.

**A. Multiple Owners.** Check "Yes" if you owned the unit that was your principal residence (main home) with someone who was not your spouse/CU partner — even if the other owner(s) did not live there. For example, you and your sister owned the unit you lived in. If you (and your spouse/CU partner) were the sole owner(s), check "No."

**B. Percentage of Ownership.** If you answered "Yes" at line A, enter the share (percentage) of the unit that you (and your spouse/CU partner) owned. For example, you and your spouse owned a unit with your sister. Your sister did not live with you, and you and your spouse paid all the property taxes. You must enter 50% as your share of ownership because you and your spouse owned only one-half (50%) of the unit. The shares of ownership of the property are considered to be held equally by all owners. If the shares of ownership are not equal, you must provide documentation as to the percentage of ownership.

## Part II – To Be Completed by Co-op Manager

Enter the appropriate amounts for Calendar Years 2022 and 2023 as follows:

**Line 1.** If the units are categorized by specific model types or unit descriptions, list the information here. Otherwise, leave the line blank.

**Line 2.** Enter the property taxes attributable to the applicant's unit for each calendar year before deductions and/or credits are subtracted.

**Line 3.** Enter the amount of senior citizen's deduction the applicant received for each calendar year, if applicable.

**Line 4.** Enter the amount of veteran's deduction the applicant received for each calendar year, if applicable.

**Line 5.** If the applicant answered "No" at Part I, line A, enter the amount of property taxes from line 2. If the applicant answered "Yes" at Part I, line A, you must apportion the amount of property taxes to be entered on line 5. Multiply the amount of property taxes on line 2 by the percentage of ownership shown at Part I, line B.

If title to the unit is held by the eligible applicant with others as "tenants in common" or joint tenants (except in the case of husband and wife or CU partners), the applicant is only eligible for the proportionate share of the reimbursement that reflects the percentage of ownership.

**Certification.** Complete the certification portion of Form PTR-1A Co-op.