2010

New Jersey Property Tax Reimbursement

Filing Deadline Extended to

➔ November 7, 2011 ➔

NOTE: **The State Budget for fiscal year 2012, that begins July 1, 2011, contains modifications to the PTR Program. Under the terms of the Budget, only those applicants whose income for 2010 does not exceed the 2009 income limit of $70,000 will receive a reimbursement for 2010, provided they met all the other program requirements.**

The Division of Taxation will accept 2010 PTR applications from residents who either did not file a 2009 application, or who filed an application for 2009 that was not approved for payment. While applicants whose income exceeds $70,000 will not receive reimbursements for 2010, they should apply to establish their eligibility for benefits in future years.

FOR INFORMATION:

Visit the Division of Taxation Web Site: **www.state.nj.us/treasury/taxation/**

Call the Property Tax Reimbursement Hotline: **1-800-882-6597**

PTR-1

STATE OF NEW JERSEY
2010 PROPERTY TAX REIMBURSEMENT APPLICATION

You must enter your social security number below

For Privacy Act Notification, See Instructions

Your Social Security Number

Last Name, First Name and Initial (Joint applicants enter first name and initial of each - Enter spouse/CU partner last name ONLY if different)

Spouse's/CU Partner's Social Security Number

Home Address (Number and Street, including apartment number or rural route)

County/Municipality Code (See Table page 10)

City, Town, Post Office | State | Zip Code

Place label on form if all preprinted information is correct. Otherwise, print or type your name and address.

1. Residency Status: ☐ Homeowner ☐ Mobile Home Owner
2. Your Marital/Civil Union Status on December 31, 2009: ☐ Single ☐ Married/CU Couple
3. Your Marital/Civil Union Status on December 31, 2010: ☐ Single ☐ Married/CU Couple

4a. On December 31, 2009, I (or my spouse/CU partner) was ☐ Age 65 or older ☐ Receiving Federal Social Security Disability Benefits.

4b. On December 31, 2010, I (or my spouse/CU partner) was ☐ Age 65 or older ☐ Receiving Federal Social Security Disability Benefits.

You must provide proof that the age or disability requirements were met **for both 2009 and 2010**. See reverse for acceptable forms of proof. If you (or your spouse/CU partner) did not meet the age or disability requirements, you are not eligible for the reimbursement and you should not file this application.

5. Did you live in New Jersey continuously since before January 1, 2000, 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.

6. Did you own and live in your New Jersey home (or lease a site in a mobile home park in New Jersey on which you placed a manufactured or mobile home that you own) since before January 1, 2007? ☐ Yes ☐ No. If "No" STOP. You are not eligible for the reimbursement and you should not file this application.

7. Complete Income Worksheet A (on reverse) and enter the amount of 2009 Total Income from Line r. . . . . 7. ___,___.__

8. Complete Income Worksheet B (on reverse) and enter the amount of 2010 Total Income from Line r. . . . . 8. ___,___.__

9. Enter the address for which you are claiming the reimbursement **if different from above.**

Street address ______________________________ Municipality ______________________

10. Homeowners: Enter the block and lot numbers of the residence for which the property tax reimbursement is being claimed.

Block ______ Lot ______ Qualifier ______

	2009	2010
11a. Did you share ownership of your principal residence with anyone other than your spouse/CU partner? (Mobile Home Owners see instructions.)	☐ Yes ☐ No	☐ Yes ☐ No
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.)	%	%
12a. Does your principal residence consist of more than one unit?	☐ Yes ☐ No	☐ Yes ☐ No
12b. If you answered "Yes," indicate the share (percentage) of the property that you (and your spouse/CU partner) occupy as your principal residence.	%	%

If you answered "Yes" at Line 11a or Line 12a, be sure to read the instructions on pages 8-9 before you complete Lines 13 and 14.

13. Enter your total 2010 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) . . . . 13. ___,___.__

14. Enter your total 2009 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) . . . . 14. ___,___.__

REIMBURSEMENT AMOUNT

15. Subtract Line 14 from Line 13. . . . . 15. ___,___.__

If Line 15 is zero or less, you are not eligible for a property tax reimbursement and you should not file this application.

Division Use 1 2 3 4 5 6

SIGN HERE

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.

Your Signature | Date | Spouse's/CU Partner's Signature (if applying jointly, BOTH must sign)

Paid Preparer's Signature | Federal Identification Number

Firm's Name | Federal Employer Identification Number

Due Date: June 1, 2011

Mail your completed application to:
NJ Division of Taxation
Revenue Processing Center
Property Tax Reimbursement
PO Box 635
Trenton, NJ 08646-0635

Property Tax Reimbursement Hotline: 1-800-882-6597

REPORTING INCOME

Losses in one category of income **cannot** be used to reduce total income. **If you have a net loss in any income category, make no entry on that line.**

Income Worksheet A
2009 Total Income

If you were married or in a civil union as of December 31, 2009, you must combine your income with your spouse's/CU partner's income.

a. Social Security Benefits . . . . ____________________
(including Medicare Part B premiums)

b. Total Pension Income . . . . ____________________
(including IRA and annuity income)

c. Salaries and Wages . . . . ____________________

d. Bonuses, Commissions & Fees . . . ____________________

e. Unemployment Benefits . . . . ____________________

f. Disability Benefits (including veterans' and black lung benefits) . ____________________

g. Interest (taxable & exempt) . . . . . . ____________________

h. Dividends . . . . ____________________

i. Capital Gains . . . . ____________________

j. Net Rental Income . . . . ____________________

k. Net Business Income . . . . ____________________

l. Support Payments . . . . ____________________

m. Inheritances . . . . ____________________

n. Royalties . . . . ____________________

o. Gambling & Lottery Winnings . . . . . ____________________
(including New Jersey)

p. Bequests and Death Benefits . . . . . ____________________

q. All Other Income . . . . ____________________

r. TOTAL . . . . ____________________

Was your total 2009 income $80,000 or less? You must report combined income of both spouses/CU partners if your status at Line 2 of the application was "Married/CU Couple."

☐ Yes. *Enter the total amount on Line 7 and continue with Income Worksheet B.*

☐ No. *STOP. You are not eligible for a property tax reimbursement.*

Income Worksheet B
2010 Total Income

If you were married or in a civil union as of December 31, 2010, you must combine your income with your spouse's/CU partner's income.

a. Social Security Benefits . . . . ____________________
(including Medicare Part B premiums)

b. Total Pension Income . . . . ____________________
(including IRA and annuity income)

c. Salaries and Wages . . . . ____________________

d. Bonuses, Commissions & Fees . . . ____________________

e. Unemployment Benefits . . . . ____________________

f. Disability Benefits (including veterans' and black lung benefits) . ____________________

g. Interest (taxable & exempt) . . . . . . ____________________

h. Dividends . . . . ____________________

i. Capital Gains . . . . ____________________

j. Net Rental Income . . . . ____________________

k. Net Business Income . . . . ____________________

l. Support Payments . . . . ____________________

m. Inheritances . . . . ____________________

n. Royalties . . . . ____________________

o. Gambling & Lottery Winnings . . . . . ____________________
(including New Jersey)

p. Bequests and Death Benefits . . . . . ____________________

q. All Other Income . . . . ____________________

r. TOTAL . . . . ____________________

Was your total 2010 income $80,000 or less? You must report combined income of both spouses/CU partners if your status at Line 3 of the application was "Married/CU Couple."

☐ Yes. *Enter the total amount on Line 8 and continue completing the application.*

☐ No. *STOP. You are not eligible for a property tax reimbursement.*

Proof of Age or Disability for 2009 and 2010 Must Be Submitted With Application

Age 65 or Older. If you (or your spouse/CU partner) indicated at Line 4a and/or 4b that you were 65 or older, you must submit proof of age with your application. Examples of acceptable documentation include copies of the following:

- Birth Certificate
- Driver's License
- Church Records

Receiving Federal Social Security Disability Benefits. If you (or your spouse/CU partner) were under 65 and indicated at Lines 4a and/or 4b that you (or your spouse/CU partner) were receiving Federal Social Security Disability Benefits, you must submit with your application a copy of the Social Security Award Letter indicating that you (or your spouse/CU partner) were receiving benefits for that year(s). You do not qualify if receiving benefits on behalf of someone else.