

**Town of Milford- Assessing Department**  
**2024 Elderly Property Tax Exemption Application (RSA 72:39-a)**  
**Income and Asset Worksheet    Deadline to file is APRIL 15, 2024**

**To Be completed By Assessor:**

PID \_\_\_\_\_ Map/Lot \_\_\_\_\_ Exemption Approved \_\_\_\_\_ Exempt Category \_\_\_\_\_

**To Be Completed By Applicant:**

Applicant Name: \_\_\_\_\_ Date of Birth \_\_\_\_\_ Age \_\_\_\_\_

Spouse Name: \_\_\_\_\_ Date of Birth \_\_\_\_\_ Age \_\_\_\_\_

Property Address: \_\_\_\_\_ Mailing Address (if different) \_\_\_\_\_

Telephone Number: \_\_\_\_\_ Married \_\_\_\_ Date of Marriage \_\_\_\_/\_\_\_\_/\_\_\_\_ Single \_\_\_\_ Widow(er)\_\_\_\_

**INCOME INFORMATION –FOR THE PERIOD JANUARY 1, 2023-DECEMBER 31, 2023**

Source	Applicant	Spouse	Assessor Adj.
<u>Social Security-Form SSA 1099</u>	\$ _____	\$ _____	\$ _____
<u>Social Security Disability Income (Title II or Title XVI)</u>	\$ _____	\$ _____	\$ _____
<u>Veterans Admin.Disability Income</u>	\$ _____	\$ _____	\$ _____
<u>Wages, Salaries, Unemployment (W-2 or 1099)</u>	\$ _____	\$ _____	\$ _____
<u>Business/Self Employed Income (2023 Tax Return all Sch)</u>	\$ _____	\$ _____	\$ _____
<u>Workers Compensation (W-2 or 1099)</u>	\$ _____	\$ _____	\$ _____
<u>Pension(s) (1099R)</u>	\$ _____	\$ _____	\$ _____
<u>Annuity Distributions (1099)</u>	\$ _____	\$ _____	\$ _____
<u>401K, IRAS, Distributions (1099R)</u>	\$ _____	\$ _____	\$ _____
<u>Dividends Stocks (1099-DIV)</u>	\$ _____	\$ _____	\$ _____
<u>Interest (1099-INT)</u>	\$ _____	\$ _____	\$ _____
<u>Real Estate Rental Income</u>	\$ _____	\$ _____	\$ _____
<u>Fuel/Electric Assistance/Food Stamps, etc</u>	\$ _____	\$ _____	\$ _____
<u>Trust Income</u>	\$ _____	\$ _____	\$ _____
<u>Other Income (ie: Home Business, Rent, Uber Driver,etc)</u>	\$ _____	\$ _____	\$ _____
<b>TOTAL INCOME \$</b>	\$ _____		<b>\$</b> _____

**ASSETS: LIST ALL ASSETS OWNED**

<u>Company Name/Acct #</u>	<u>Asset Type</u>	<u>Balance</u>	<u>Required Supporting Documentation</u>
_____	Checking Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Checking Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Checking Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Savings Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Savings Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Savings Acct	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Money Market	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	Money Market	\$ _____	Nov, Dec, Jan Monthly Statement-All Pages
_____	IRA/CD	\$ _____	December 31, 2023 Year End Statement
_____	IRA/CD	\$ _____	December 31, 2023 Year End Statement
_____	IRA/CD	\$ _____	December 31, 2023 Year End Statement
_____	401K	\$ _____	December 31, 2023 Year End Statement
_____	401K	\$ _____	December 31, 2023 Year End Statement
_____	Stocks/Bonds	\$ _____	December 31, 2023 Year End Statement
_____	Stocks/Bonds	\$ _____	December 31, 2023 Year End Statement
_____	Stocks/Bonds	\$ _____	December 31, 2023 Year End Statement
_____	Savings Bonds	\$ _____	December 31, 2023 Year End Statement
_____	Mutual Funds	\$ _____	December 31, 2023 Year End Statement
_____	Mutual Funds	\$ _____	December 31, 2023 Year End Statement
_____	Annuities	\$ _____	December 31, 2023 Year End Statement
_____	Annuities	\$ _____	December 31, 2023 Year End Statement
_____	Whole Life Ins	\$ _____	December 31, 2023 Year End Statement
	<b><u>Sub-Total</u></b>	<b><u>\$ _____</u></b>	<b><u>Assessor Adjusted</u></b> <b><u>\$ _____</u></b>

**Please use this page to list any additional income or asset accounts not included on pages 1 or 2. For example you may have additional income sources or more than 3 checking or 3 savings accounts or own more stock shares, mutual funds etc.**

**Please include any other accounts that you own jointly with others (example; children, grandchildren, siblings, Trust Accounts)**

**DEADLINE TO FILE IS APRIL 15, 2024**

**VEHICLES: Cars, Trucks, Motorcycle, Antique Cars, Boats, Motor Home, Camper, Snowmobile, Trailer and other type of Recreational Vehicles.**

<u>Year/Make/Model</u>	<u>Mileage</u>	<u>Market Value</u>	<u>Current Loan Balance</u>	<u>Net Value</u>
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____
_____	_____	\$ _____	\$ _____	\$ _____

**EXCLUDE PRIMARY RESIDENCE - LIST ANY OTHER REAL ESTATE OWNED.**

**Do you own (individually, jointly, in common, in trust, or fractional) any other real estate anywhere?**  
 YES \_\_\_\_\_ NO \_\_\_\_\_ (Please provide the current tax bill & loan balance statement.)

<u>Property Type</u>	<u>Address</u>	<u>Market Value</u>	<u>Current Loan Balance</u>	<u>Net Value</u>
Real Estate	_____	\$ _____	\$ _____	\$ _____
Commercial/Business	_____	\$ _____	\$ _____	\$ _____
Land	_____	\$ _____	\$ _____	\$ _____
Timeshares	_____	\$ _____	\$ _____	\$ _____
Camp/Camp Site	_____	\$ _____	\$ _____	\$ _____
Cottage	_____	\$ _____	\$ _____	\$ _____
Mobile Home	_____	\$ _____	\$ _____	\$ _____
<b><u>SUBTOTAL</u></b>				\$ _____

**TOTAL OF ALL ASSETS: (Pages 2 - 4)** \$ \_\_\_\_\_  
**Assessor Adjusted** \$ \_\_\_\_\_

**MORTGAGE INFORMATION:**

Do you have a current mortgage on your Milford property? Yes \_\_\_\_\_ No \_\_\_\_\_

Bank Name \_\_\_\_\_ Please provide current mortgage statement **NOT** interest paid statement.  
 This includes Home Equity Loans & Lines of Credit & Reverse Mortgages.

**PROPERTY OWNERSHIP INFORMATION:**

Residence is owned: Solely \_\_\_\_\_ Jointly with Spouse or Others as JTWRoS \_\_\_\_\_ Tenants in Common \_\_\_\_\_%  
 Revocable Trust \_\_\_\_\_ Irrevocable Trust \_\_\_\_\_ Life Estate \_\_\_\_\_ (If in a Trust must complete PA-33 & provide copy of Trust in order to determine eligibility)  
 Have you or your spouse ever, or are you now, receiving any exemption from any community in NH or any other state?  
 If yes, list the Community and State \_\_\_\_\_  
 Does anyone other than your spouse live with you? \_\_\_\_\_ Relationship \_\_\_\_\_

**IRS/ TAX INFORMATION:**

Did you (will you) file an IRS Tax Return for 2023? (If yes provide copy of 2023 return) YES \_\_\_\_\_ NO \_\_\_\_\_  
 Have you (will you) or your spouse filed a NH Interest & Dividends Tax Return for 2023? YES \_\_\_\_\_ NO \_\_\_\_\_

**DEADLINE TO FILE IS APRIL 15, 2024**

**AFFIDAVIT**

**Please read, initial each line, and sign below. If there is anything you do not understand, please ask assessing staff for clarification.**

\_\_\_ I certify that I do not claim residency in any other city or town, or in any other state.

\_\_\_ I swear under penalties of perjury that I have been a resident of New Hampshire for the last three consecutive years preceding April 1st and that the property on which the exemption is claimed is my primary residence and principle place of abode.

\_\_\_ I certify under penalty of perjury that I am not receiving any other residential tax exemption or tax credit in any other community within NH and I am not receiving a similar benefit such as a homestead exemption in any other state.

\_\_\_ If I relocate within the Town of Milford, I must file an amended application with the Assessing Department as soon as possible, on or before December 1, immediately following the change in residence.

\_\_\_ A person is guilty of a misdemeanor if, with the purpose to deceive a public servant in the performance of his official function, he/she makes any written false statement which he/she does not believe to be true, or if he/she knowingly creates a false impression in this written application for pecuniary or other benefits by omitting information necessary to prevent statements therein from being misleading, or if he/she submits or invites reliance on any writing which he/she knows to be lacking in authenticity. RSA 641:3

\_\_\_ The Town of Milford will use all available resources to verify an applicant’s eligibility for tax credit or exemption.

\_\_\_ I swear under the penalties of perjury that all information provided is a correct and accurate accounting of my financial condition, to the best of my knowledge.

\_\_\_ I further authorize any agency or financial institution to release information about me or copies of my records to the Assessing Office of the Town of Milford, New Hampshire and release all persons whomsoever from any liability resulting from the release of this information.

\_\_\_ I / We have read and understood the above statements. Any misrepresentation on my part may result in court action for recovery. I certify the information submitted is true and accurate to best of my knowledge.

\_\_\_ First time Applicants must complete a PA-29.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Spouse

\_\_\_\_\_  
Date

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Print Name

**Documentation submitted is confidential;** once a decision is made you may pick up your paperwork.

OR  
**Allow copies to be shredded by Assessing Staff \_\_\_\_\_ (Please Initial only if allowing to Shred)**

**DEADLINE TO FILE IS APRIL 15, 2024**



## **APPLICATIONS ACCEPTED FROM JANUARY 1, 2023 TO APRIL 15, 2024**

### **REQUIRED DOCUMENTATION:**

- Social Security Benefit Statement(s) for 2023 forms SSA1099/1042S.
- W-2's If Applicable for 2023.
- All other 2023-1099's for all distributions. (Pension, Retirement, IRA's Annuities, etc.)
- Federal Income Tax return for 2023 all pages all schedules.
- Dividend Statement(s) & Interest Income Statement for 2023.
- 2023 year-end statements all pages for **all** 401K, IRAS, Certificates of Deposits, Retirement, Pension, Mutual Funds, Stocks, Bonds, Annuities, etc.
- Current Real Estate Mortgage Statement, this includes home equity loans, lines of credit & reverse mortgages. (If applicable) **NOT INTEREST PAID STATEMENT**
- Bank Statements from **All Banks/All Pages-for 3 months**. Including Checking, Savings, Money Markets, etc.
- Loan balance as of December 31, 2023 for any automobiles, RV's etc. (if applicable)
- Documentation of any Fuel, Electric, State, or any other type of assistance, including any monies received from others.
- Rental Income, this would also include rental income received from other persons living in the household.
- Property Tax Inventories from other states/communities.
- Driver's license or birth certificate.
- First time Applicants must submit a PA-29 with their completed worksheet application.

**Failure to accurately complete and submit the worksheet and/or supporting documentation may result in those persons being removed from the program.**

### **SUBMITTING YOUR COMPLETED PAPERWORK:**

Your information may be submitted using one of the following methods:

1. the drop box located at the top of the ramp inside the glass entry on 1 Nashua St. **Please be sure all your information is placed in a sealed envelope and addressed to the Assessing Office,**
2. you may drop your paperwork off by appointment with the Assessor. Please call 603-249-0615 before coming by to be sure someone is in, or
3. You may mail your information to the Assessing office.

**Please remember the deadline to file is APRIL 15, 2024.**