

DEADLINE TO FILE: APRIL 15, 2013

PLEASE SUBMIT APPLICATIONS BETWEEN JANUARY 1 AND APRIL 15, 2013

In addition to the completed application (pages 2-4 below) the following supporting documentation **will be required** to verify eligibility. All information supplied will be treated confidentially and any supporting documents will be returned upon approval or denial of the application.

All documentation submitted must be originals

- Social Security Benefit Statement(s) for 2012 forms 1099/1042S.
- W-2's If Applicable for 2012.
- All other 1099's for all distributions. (Pension, Retirement, IRA's, Annuities, etc)
- Federal Income Tax return for 2012 all pages all schedules. (if you file)
- Dividend Statement(s)& Interest Income Statement for 2012.
- **2012 year end statements** for all 401K, IRA, 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 most 3 current months**. Including Checking, Savings, Certificates of Deposit, Money Markets, ect.
- Documentation of any Fuel, Electric, State, or any other type of assistance, including any monies received from others.
- Rental Income, this would also include any monies received from other persons living in the household.
- Property Tax Inventories from other states/communities.
- Driver's license or birth certificate.

Failure to supply the application and/or supporting documentation may result in those persons being removed from the program. Please remember filing deadline is **APRIL 15, 2013**.

Please contact us at 603-249-0615 if you have questions on any of the above requirements.

PLEASE PRINT & COMPLETE THE APPLICATION ON THE FOLLOWING PAGES AND SUBMIT WITH THE SUPPORTING DOCUMENTATION LISTED ABOVE. ONCE COMPLETE PLEASE CALL OUR OFFICE FOR AN APPOINTMENT.

TOWN OF MILFORD

Elderly Tax Exemption Income and Asset Statement for the Tax Year 2013

RSA 72:39a + RSA 72:39b

Deadline to file is APRIL 15, 2013

Applicant Name: _____ Date of Birth _____ Age _____

Spouse Name: _____ Date of Birth _____ Age _____

Property Address: _____

Telephone Number: _____ Mailing Address: _____

Married _____ Date of Marriage ____/____/____ S____ W____ D____

Applicant has been a legal resident of New Hampshire since _____

Residence is owned: Solely , with Spouse , in Trust , with Others as Joint Tenants , with Others as Tenants in Common (If in Trust, you must provide a complete copy of all Trust documentation in order to determine eligibility).

2012 ANNUAL INCOME INFORMATION

APPLICANT

SPOUSE

Social Security (Gross from 2012)
(includes any Social Security disability Income)

\$ _____

\$ _____

Wages/ Salaries - 2012
(Include W-2, 1099)

\$ _____

\$ _____

Pension/Retirement -2012 (Include W-2)

\$ _____

\$ _____

Interest Income -2012(all sources)

\$ _____

\$ _____

Dividend Income -2012
Includes Stock, Bonds Capital Gains, Etc,

\$ _____

\$ _____

Annuities, IRA & 401K Distributions -2012

\$ _____

\$ _____

Rental Income-2012(Includes any financial
assistance from persons living in the household)

\$ _____

\$ _____

All other income or assistance not listed above
(Includes any local, state or federal assistance)
(Includes any financial assistance from others)

\$ _____

\$ _____

TOTAL

\$ _____

\$ _____

TOTAL COMBINED INCOME

\$ _____

ASSET INFORMATION Must provide original statements, all accounts, all pages for the most recent 3 months for you and your spouse. Printouts obtained from the bank must be stamped and signed by a bank representative and show a full 3 month history.

Bank/Institution Name	Checking Account #	Balance
Bank/Institution Name	Checking Account #	Balance

Bank/Institution Name	Savings Account #	Balance
Bank/Institution Name	Savings Account #	Balance

Bank/Institution Name	Certificate of Deposit Account #	Balance
Bank/Institution Name	Certificate of Deposit Account #	Balance

MUST PROVIDE 2012 YEAR END STATEMENTS FOR THE FOLLOWING ACCOUNTS

Bank/Institution Name	IRAS/SEP, ETC Account #	Balance

Company /Institution Name	401K/Retirement, ETC Account #	Balance

Bank/Institution/Company	Mutual Funds/Stocks Bonds Account #	Balance

Bank/Institution/Company	Annuities Account #	Balance

TOTAL ASSETS: _____

Did you file an IRS Tax Return for 2012? (If yes provide copy of 2012 return) YES___ NO___
Have you or your spouse filed a NH Interest & Dividends Tax Return for 2012 YES___ NO___
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_____

Value of Vehicles,

Vehicle 1: Year/Make/Model _____ Value \$_____

Vehicle 2: Year/Make/Model _____ Value \$_____

Trailer/RV/Boats/Motorcycles: Year/Make/Model _____ Value \$_____

Antique Cars: Year/Make/Model _____ \$ Value _____

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.

Do you own (individually, jointly, in common, fractional) **any other real estate anywhere** including, homes, land, mobile homes, condos, times shares, etc. YES_____ NO_____

If yes please attach a copy of the current tax bill and mortgage statement.

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 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 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.

SIGNATURE OF APPLICANT

DATE

SIGNATURE OF SPOUSE

DATE

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