

**TOWN OF DUNBARTON**  
**1011 School Street**  
**Dunbarton, NH 03046**

**ELDERLY TAX EXEMPTION QUALIFICATION**

This worksheet is to be completed and submitted along with completed Form PA-29, Permanent Application for Property Tax Credit/Exemptions. All information supplied will be treated confidentially and any supporting documents will be returned upon approval or denial of the application. Please note the following **Income and Asset Limits** when considering submission of your application:

INCOME LIMITS:      Single **\$20,000**    Married **\$30,000**

ASSET LIMIT:          Single **\$50,000**    Married **\$50,000**

If you hold a life estate in the property or your property is owned by a trust, you must also submit a completed form PA33 (Statement of Qualification) **and** submit a copy of the deed showing the assigned ownership of the life estate **or** a copy of the Declaration of Trust, including a list of beneficiaries

Please print all information clearly:

Applicant's Name: \_\_\_\_\_

Spouse: \_\_\_\_\_

Property Address: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

**INCOME:**

Please list the source and amount of all income for year for both you and your spouse.

<b>SOURCE:</b> (Net income)	<b>OWNER #1:</b>	<b>OWNER #2:</b>
Social Security:	\$ _____	\$ _____
Pension & Retirement	\$ _____	\$ _____
Wages:	\$ _____	\$ _____
Rental Income:	\$ _____	\$ _____
Other Income/Annuities:	\$ _____	\$ _____
Interest Income:	\$ _____	\$ _____
<b>TOTAL INCOME:</b>	<b>\$ _____</b>	<b>\$ _____</b>

If you have filed any of the following – please provide a copy.

1. Interest and Dividend tax return to the State of NH
2. Federal Income Tax Form

## ASSETS:

Please list all assets owned (Self & Spouse)

Savings Accounts or Investments/Certificates: (CD's, Stocks & Bonds, IRA's, Annuities, Travel Trailers, Boats, Antiques, Cars etc.)

<u>INSTITUTION NAME:</u>	<u>TYPE:</u>	<u>VALUE/AMOUNT</u>
_____ Checking	_____	_____
_____ Savings	_____	_____
_____ Savings	_____	_____
_____ IRA	_____	_____
_____ Other	_____	_____

## VEHICLES:

A.	Make / Model / Year / Mileage	_____	Est. Value \$ _____
B.	Make / Model / Year / Mileage	_____	Est. Value \$ _____
C.	Boat / Model / Year	_____	Est. Value \$ _____
D.	RV / Model / Year	_____	Est. Value \$ _____
E.	Other / Description	_____	Est. Value \$ _____

## REAL ESTATE: (not including your primary residence)

Property Type \_\_\_\_\_ in Town/State \_\_\_\_\_  
\*\*Provide copy of tax bill.  
Est. Value \$ \_\_\_\_\_

**TOTAL ASSETS \$** \_\_\_\_\_

\*\*\* Note: Complete applications received by APRIL 15<sup>th</sup> will be reflected on the June Tax bill.

I swear, under penalty of perjury, that all the above 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 any agent of the **Town of Dunbarton**. I release all persons whomsoever from any liability resulting from the release of this information.

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_

PRINTED NAME: \_\_\_\_\_

TELEPHONE NUMBER: \_\_\_\_\_

**PLEASE RETURN THIS QUESTIONNAIRE BY APRIL 15<sup>TH</sup>, THANK YOU.**