

**Elderly Exemption Worksheet  
Middleton, NH**

Date: \_\_\_\_\_

Applicant's Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

Spouse's Name: \_\_\_\_\_ Date of Birth: \_\_\_\_\_

**Note: 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)**

- 1) Did you file an Interest and Dividend tax return to the State of NH?    Y or N
  
- 2) Do you file a Federal Income Tax Return?    Y or N  
    If yes, what was the most recent year filed? \_\_\_\_\_

**NOTICE: If you have filed either or both of the above returns, copies MUST accompany this worksheet and application.**

***INCOME:***

Please note the following Income and Asset Limits when considering submission of your application:

<b>INCOME LIMITS:</b>	<b>Single [\$30,000]</b>	<b>Married [\$40,000]</b>
<b>ASSET LIMIT:</b>	<b>Single [\$75,000]</b>	<b>Married [\$75,000]</b>

Source	Applicant	Applicant Spouse
Social Security	\$ _____	\$ _____
Pension & Retirement	\$ _____	\$ _____
Wages	\$ _____	\$ _____
Rental Income	\$ _____	\$ _____
Interest Income	\$ _____	\$ _____
Other Income/Annuities	\$ _____	\$ _____

**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.)

Institution Name	Type	Present Value/Amount
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

**NOTE: Bank statements for the past THREE months must accompany this worksheet and application.**

**Vehicles:**

Make: \_\_\_\_\_ Model: \_\_\_\_\_ Yr: \_\_\_\_\_ Est. Value: \_\_\_\_\_  
Make: \_\_\_\_\_ Model: \_\_\_\_\_ Yr: \_\_\_\_\_ Est. Value: \_\_\_\_\_  
Boat: \_\_\_\_\_ Model: \_\_\_\_\_ Yr: \_\_\_\_\_ Est. Value: \_\_\_\_\_  
RV: \_\_\_\_\_ Model: \_\_\_\_\_ Yr: \_\_\_\_\_ Est. Value: \_\_\_\_\_

**Other Assets:**

Description: \_\_\_\_\_ Est. Value: \_\_\_\_\_  
Description: \_\_\_\_\_ Est. Value: \_\_\_\_\_

**Other Real Estate:**

Property Type: \_\_\_\_\_ Town/State: \_\_\_\_\_ Est. Value: \_\_\_\_\_  
Property Type: \_\_\_\_\_ Town/State: \_\_\_\_\_ Est. Value: \_\_\_\_\_

This completed worksheet, IRS Form 4056-T, PA-33 (if applicable) needs to be submitted along with a 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.

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 Middleton Assessing Office. I release all persons whomsoever from any liability resulting from the release of this information.

Applicant's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**REMINDER: All supporting documentation must accompany this form as applicable.**