

Parcel ID: _____

Name: _____

TOWN OF PETERBOROUGH

WORKSHEET FOR ELDERLY EXEMPTION (RSA 72:39a), TO BE SUBMITTED WITH FORM PA-29

NOTE: This is a double-sided form. Ensure you sign the form on the back and include all supporting documents. Worksheet and related application will not be processed until all needed supporting documents are provided.

1. PERSONAL INFORMATION

- a. Applicant Name(s): _____
- b. Mailing address: _____
- c. Marital Status: Married: _____ Single: _____ Widow: _____
- d. Residence Owned: Solely: _____ W/ Spouse: _____
W/ Others as: Joint Tenants: _____ Tenants in common: _____
- e. Number of Years Owned: _____
- f. I have been a legal resident of New Hampshire since: _____
- g. Age: _____ Date of Birth: ____/____/____
- h. Do you own Real Estate other than your occupied NH residence Yes _____ No _____
(if yes, please attach copy of tax bill)
- i. Phone number: _____

2. INCOME INFORMATION (YEARLY AMOUNTS)

VERIFICATION OF ALL OF THE FOLLOWING MUST BE SUBMITTED

	<u>APPLICANT</u>	<u>SPOUSE</u>
a. Social Security:	\$ _____	\$ _____
b. Pension & Retirement:	\$ _____	\$ _____
c. Wages:	\$ _____	\$ _____
d. Rental Income:	\$ _____	\$ _____
e. Other Income:	\$ _____	\$ _____
f. Interest Income:	\$ _____	\$ _____

TOTAL INCOME: \$ _____

****PLEASE CHECK THE FOLLOWING IF IT APPLIES TO YOU****

Are you required to file an Interest & Dividend tax return with the State of New Hampshire?

YES _____ NO _____ (if yes, provide a copy of most recent return)

Are you required to file an IRS tax return? YES _____ NO _____ (if yes, provide a copy of most recent return)

CONTINUED - PLEASE TURN OVER

3. ASSET INFORMATION

- a. Type of property for which exemption is claimed: Single-Family_____ Multi-Family_____
- b. If Multi-Family, in which unit do you reside:_____
- c. List value of stocks, bonds, certificates of deposit, money market shares, mutual funds, annuities etc:

VERIFICATION OF ALL OF THE FOLLOWING MUST BE SUBMITTED

- Type_____ Institution:_____ Balance \$ _____
- Type_____ Institution:_____ Balance \$ _____
- Type_____ Institution:_____ Balance \$ _____
- Type_____ Institution:_____ Balance \$ _____

- d. List current balances of all banking and savings accounts in your name and spouse’s name:

VERIFICATION OF ALL OF THE FOLLOWING MUST BE SUBMITTED

- Checking Account: Institution:_____ Balance \$ _____
- Savings Account: Institution:_____ Balance \$ _____
- Other Account: Institution:_____ Balance \$ _____
- Other Account: Institution:_____ Balance \$ _____

- e. **ESTIMATED** value of furniture, expensive jewelry, furs, gold, collectable coins, antiques etc:
\$ _____

- f. **VEHICLES:** Please list all vehicles including RVs, boats or other recreational vehicles: (for values, please refer to the Kelley Blue Book or call a local dealer)

- Vehicle Make_____ Model_____ Year_____ Est. Value \$ _____
- Vehicle Make_____ Model_____ Year_____ Est. Value \$ _____
- Vehicle Make_____ Model_____ Year_____ Est. Value \$ _____

- g. Real Estate Other than Primary Residence: Please complete if applicable

- Property Type_____ Town & State_____ Est. Value \$ _____
- Property Type_____ Town & State_____ Est. Value \$ _____

TOTAL ASSETS: \$ _____

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 PETERBOROUGH ASSESSING OFFICE. I RELEASE ALL PERSONS WHOSOEVER FROM ANY LIABILITY ARISING OUT OF OR RESULTING FROM THE RELEASE OF THIS INFORMATION.

Signature: _____ Date: _____