

**2009 EAST PENN SCHOOL DISTRICT
PROPERTY TAX REBATE PROGRAM APPLICATION (PTR-1000)
MUST BE FILED BETWEEN JANUARY 31 AND JUNE 1, 2010**

PART 1 – CLAIMANT INFORMATION

Claimant Name _____
 Claimant Social Security # _____ Claimant Date of Birth _____
 Spouse Name _____
 Spouse Social Security # _____ Spouse Date of Birth _____
 Address _____
 Daytime Phone Number _____ Municipality of Residence _____

PART 2 – FILING STATUS

- I certify that I am: **(Check one box only)**
- A. A Claimant, age 65 or older as of December 31, 2009
 - B. A Claimant under age 65, with a Spouse age 65 or older as of December 31, 2009
 - C. A Widow or Widower, age 50 to 64 as of December 31, 2009
 - D. Permanently Disabled, age 18 to 64, during 2009

<u>Income Eligibility Guidelines</u>			
Total Household Income	Percentage Factor (B1)	Maximum Rebate (B2)	
\$0 to \$ 9,999	100%	\$650	
\$10,000 to \$14,999	50%	\$500	
\$15,000 to \$20,000	25%	\$250	
\$20,001 and above	0%	\$ 0	

PART 3 – PROPERTY TAX REBATE CALCULATION WORKSHEET

A. Total household income of Claimant and Spouse (Use 2009 Form PA-1000 Line 12 information) \$ _____

B-1 East Penn Rebate percentage based on income (From Income Eligibility Guideline table) _____ %

B-2 Maximum potential rebate based on eligible income (From Income Eligibility Guideline Table) \$ _____

C. 2009-2010 East Penn School taxes paid (Net of tax reduction) \$ _____

D. 2009 Pennsylvania Property Tax Rebate claim (Use 2009 Form PA -1000 Line 14 information) - \$ _____

E. East Penn School taxes paid available for rebate (Line C minus Line D) \$ _____

F. Rebate based on household income/percentage factor (Line C multiplied by Line B1) \$ _____

G. East Penn Property Tax Rebate available (Write in the lesser amount of Lines B2/E/F) \$ _____

PART 4 – SIGN AND DATE

CLAIMANT: I declare that this claim is true, correct and complete to the best of my knowledge and belief. This is the only claim filed by members of my household.

PREPARER: I declare that I prepared this return and that it is to the best of my knowledge and belief, true, correct and complete.

Claimant Signature and Date

Preparer's Signature, Date and Phone Number

A SIGNED COPY OF FORM PA-1000 WITH ALL APPLICABLE SCHEDULES, SUPPORTING INCOME DOCUMENTATION AND A COPY OF YOUR RECEIPTED EAST PENN SCHOOL DISTRICT PROPERTY TAX BILL FOR THE 2009-2010 SCHOOL YEAR MUST BE ATTACHED TO THIS FORM TO BE ELIGIBLE TO RECEIVE AN EAST PENN SCHOOL DISTRICT PROPERTY TAX REBATE.

<i>Business Office Use Only</i>	
Amount Approved _____	Information Checked/Verified _____
Account Number _____	Management Approval _____

**2009 EAST PENN SCHOOL DISTRICT
PROPERTY TAX REBATE APPLICATION (PTR-1000)
FILING DIRECTIONS**

NOTE: A CLAIMANT MUST FIRST COMPLETE THE PENNSYLVANIA PROPERTY TAX REBATE FORM PA-1000 (AVAILABLE FROM THE PA DEPARTMENT OF REVENUE).

FILING CHECKLIST:

- Sign & date the East Penn Property Tax Rebate Application (on front of form).
- Attach a signed copy of your 2009 PA-1000 (State rebate application).
- Attach a copy of your receipted East Penn School District school tax bill for the 2009-2010 school year.
- Attach all copies of paperwork to support Lines 4 through 11 of your 2009 PA-1000 (State Rebate Application), including Forms 1099, Social Security SSA-1099, Social Security Disability, SSI or State Supplementary payment statements received.

CLAIMANT QUALIFICATIONS:

- Owner occupied, principal residence within East Penn School District on which East Penn School District Property taxes were paid during 2009 for the 2009-2010 school year.
- Meet one of the following filing status qualifications:
 - Age 65 or older as of December 31, 2009.
 - Under age 65 with a spouse age 65 or older as of December 31, 2009.
 - Widow or widower, age 50 to 64 as of December 31, 2009.
 - Permanently disabled, age 18 to 64 during 2009.
- Meet the East Penn School District income guidelines (on front of form).

WHERE TO FILE:

BUSINESS OFFICE
EAST PENN SCHOOL DISTRICT
800 PINE STREET
EMMAUS, PA 18049

WHEN TO FILE:

January 31, 2010 – June 1, 2010

OTHER INFORMATION:

East Penn School District will rebate school property tax paid in excess of the total state property tax rebate that the claimant qualifies for up to a maximum school district refund of \$650. The actual refund amount will be determined by East Penn School District based upon the information provided by the claimant. The school district will not issue a rebate that when added to the State rebate would exceed the total amount of school district property tax paid.