

**2011 EAST PENN SCHOOL DISTRICT
PROPERTY TAX REBATE PROGRAM APPLICATION (PTR-1000)
MUST BE FILED BETWEEN JANUARY 31 AND JUNE 1, 2012**

PART 1 – CLAIMANT INFORMATION

Claimant Name _____
 Claimant Social Security # _____ Claimant Date of Birth _____
 Spouse Name _____
 Spouse Social Security # _____ Spouse Date of Birth _____
 Address _____ City/State/Zip Code _____
 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, 2011
- B. A Claimant under age 65, with a Spouse age 65 or older as of December 31, 2011
- C. A Widow or Widower, age 50 to 64 as of December 31, 2011
- D. Permanently Disabled, age 18 to 64, during 2011

<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 2011 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. 2011-2012 East Penn School taxes paid (Net of tax reduction) \$ _____

D. 2011 Pennsylvania Property Tax Rebate claim (Use 2011 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 2011/12 school year must be attached to this form to be eligible to receive an East Penn School District Property Tax Rebate. East Penn School District requires copies of all 1099's to support income shown on your PA-1000.

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

**2011 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: ALL SUPPORTING DOCUMENTS MUST BE INCLUDED WITH THE APPLICATION, OTHERWISE, THE APPLICATION WILL BE RETURNED TO YOU DELAYING YOUR REBATE.

- Sign & date the East Penn Property Tax Rebate Application (on front of form).
- Attach a signed copy of your 2011 PA-1000 (State rebate application).
- Attach a copy of your receipted East Penn School District school tax bill for the 2011-2012 school year.
- Attach all copies of paperwork to support Lines 4 through 11 of your 2011 PA-1000 (State Rebate Application), including Forms 1099, Social Security SSA-1099, Social Security Disability, SSI or State Supplementary payment statements received. East Penn School District requires copies of the 1099's to support income shown on your PA-1000.

CLAIMANT QUALIFICATIONS:

- Owner occupied, principal residence within East Penn School District on which East Penn School District Property taxes were paid in full during 2011 for the 2011-2012 school year.
- Meet one of the following filing status qualifications:
 - Age 65 or older as of December 31, 2011.
 - Under age 65 with a spouse age 65 or older as of December 31, 2011.
 - Widow or widower, age 50 to 64 as of December 31, 2011.
 - Permanently disabled, age 18 to 64 during 2011.
- 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, 2012 – June 1, 2012

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.