

## INSTRUCTIONS FOR APPLICANT REQUESTING CONSIDERATION FOR A POVERTY EXEMPTION

1. Applicant must obtain the proper application from the Assessor's Office. Handicapped or infirm applicants must call the Assessor's Office to make necessary arrangements for assistance.
2. Applicants must be owners of the property and reside there.
  - A. Must produce driver's license or other acceptable methods of identification.
  - B. Must produce a deed, land contract or other evidence of ownership if Assessor requests it.
3. Applicant must fill out application form in its entirety and return it, in person, to this office, except as noted in item 1 above.
  - A. Must not sign it until returned.
  - B. Application must be witnessed by the Assessing Officer or Board of Review.
4. All applicants will submit last year's copies of the following:
  - A. Federal Income Tax Return – 1040 or 1040A.
  - B. State Income Tax Return – MI-1040.
  - C. Homestead Property Tax Claim – MI-1040CR.
5. Applications must be filed with the Assessor prior to December 1st.
6. Applications may be reviewed by the Board without applicant being present. However, the Board may request that an applicant be physically present to respond to any questions the Board or Assessor may have. This means that you may be called to appear on short notice.
7. You may have to answer questions regarding your financial affairs, your health, the status of people living in your home before the Board, at a meeting which is open to and will be attended by the public at large.
8. Applicants appearing before the Board will be administered an oath, as follows:

"Do you \_\_\_\_\_ swear and affirm that evidence and testimony you will give in your own behalf before the Board of Review is the truth, the whole truth, and nothing but the truth, so help you."
9. The Supervisor/Assessor must agree to the Board's decision as regards the disposition of all individual poverty claims or the decision is null and void.
10. Applicants will be evaluated based on:
  - A. Data submitted to the Board by petitioner.
  - B. Testimony taken from petitioner and information gathered from any source the Board may wish to use.
11. The Board will also consider all revenue and non-revenue producing assets owned by the petitioner in its deliberation as to whether relief should be granted.
12. The Board can only grant property tax exemption based on poverty for the current year.
13. A successful applicant may be subject to personal investigation by the City. This would be done to verify information submitted or statements made to the Assessor or Board of Review in regard to their poverty tax exemption claim.
14. The Assessor may tape record and will keep minutes of all proceedings before the Board of Review and all meetings must be held in a municipal building.

# POVERTY EXEMPTION APPLICATION

I \_\_\_\_\_, being the owner and resident of the property listed below, desire to appeal for Tax Relief under section 7u of the Michigan General Property Act: "The real and personal property of persons who, in the judgment of the assessor and board of review, by reason of poverty, are unable to contribute toward the public charges, are exempt from taxation under this act."

## Property Description

Address \_\_\_\_\_ Parcel Tax ID# \_\_\_\_\_

Phone No. \_\_\_\_\_

Marital Status: Married \_\_\_\_\_ Single \_\_\_\_\_ Separated \_\_\_\_\_ Divorced \_\_\_\_\_ Widow \_\_\_\_\_ Widower \_\_\_\_\_

Age of Applicant \_\_\_\_\_

Did you apply for Homestead Property Tax Credit? (Form MI 1040CR) \_\_\_\_\_

How much was the credit? \_\_\_\_\_

Real Estate: Is home paid in full? \_\_\_\_\_

If not, what is the unpaid balance? \_\_\_\_\_

Name of the Mortgage Co \_\_\_\_\_ Monthly payments: \_\_\_\_\_

How long have you lived at this address? \_\_\_\_\_

Do you own, or are you buying other property? \_\_\_\_\_

If so, list below:

<u>Property Address</u>	<u>Property in the name of whom</u>	<u>Assessed Value</u>	<u>Amount and date of last taxes paid</u>
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_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

Gross Income from property \_\_\_\_\_

Name of Employer \_\_\_\_\_

List all Income from: Salaries, Social Security, Rents, Pension, Unemployment Compensation, Disability, Government Pensions, Dividends, Workman's Compensation, Union, Claims and Lawsuits, Alimony, Child Support, or any other source.

Source of Income

Amount Monthly

_____	_____
_____	_____
_____	_____

Bank Accounts and Savings: List all bank accounts owned by you or your spouse, also savings certificates, Postal Savings and Cash in deposit boxes, on hand, or on deposit in Credit Unions.

Name of Bank, Savings & Loan, or Postal, Savings Bank, etc.

Amount on Deposit Now

Whose Name is Account in

Balance in Account

_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____

List all Stock, Bonds, Mortgages, Land Contracts etc owned by you or your spouse:

Current Value

Dividends & Interest Rec'd

Life Insurance: List all Policies held by you and all members of your household:

<u>Insured</u>	<u>Face Amount of Policy</u>	<u>Amt. Paid Monthly</u>	<u>Paid Up Policies</u>	<u>Name of Beneficiaries</u>	<u>Relationship of Beneficiary</u>
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Motor Vehicles In Household:

1. Make \_\_\_\_\_ Year \_\_\_\_\_ Monthly Payment \_\_\_\_\_ Balance \_\_\_\_\_
2. Make \_\_\_\_\_ Year \_\_\_\_\_ Monthly Payment \_\_\_\_\_ Balance \_\_\_\_\_
3. Make \_\_\_\_\_ Year \_\_\_\_\_ Monthly Payment \_\_\_\_\_ Balance \_\_\_\_\_

List below all persons living with you:

<u>Last Name</u>	<u>First Name</u>	<u>Age</u>	<u>What is their Relationship</u>	<u>Are they Working?</u>	<u>Monthly Earnings</u>	<u>Monthly House Contributions</u>
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Personal Debts: What do you owe?

<u>To Whom</u>	<u>For What</u>	<u>Date of Debt</u>	<u>Original Amount</u>	<u>Monthly Payment</u>	<u>Balance</u>
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Other Monthly Obligations and Debts: Include utilities, phone, garbage, cable TV, medicines, etc.

<u>To Whom</u>	<u>Amount</u>	<u>To Whom</u>	<u>Amount</u>
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Asset Listing: List all other assets owned or controlled by you and their value. For example: Boats, coin collections, art objects, antiques, silver, gold, etc.

