

KANSAS PROPERTY TAX RELIEF CLAIM for Low Income Seniors

FILE THIS CLAIM AFTER DECEMBER 31, 2008, BUT NO LATER THAN APRIL 15, 2009

Claimant's Social Security Number

Grid for Social Security Number

First four letters of claimant's last name. Use ALL CAPITAL letters.

Grid for last name letters

Claimant's Telephone Number

Grid for Telephone Number

Name and Address

Name and Address fields: First Name, Initial, Last Name, Home Address, City, State, Zip Code, County Abbreviation

Mark this box if claimant is deceased (See instructions) . . . . .

Date of Death \_\_\_\_/\_\_\_\_/\_\_\_\_

IMPORTANT: Mark this box if name or address has changed . . . . .

Mark this box if this is an amended claim . . . . .

Qualifications

To qualify for this property tax refund you must meet the household income limitation and you must have been:

- 1. A resident of Kansas during the entire year of 2008;
2. A home owner during 2008; and,
3. Age 65 or over for the entire year. Enter your date of birth (must be prior to 1943) . . . . .

NOTE: If you filed a Form K-40H for 2008, you DO NOT qualify for this property tax refund.

MONTH DAY YEAR grid for date of birth

Household Income

Enter the total received in 2008 for each type of income. See instructions on the back of this form.

- 4. 2008 Wages OR Kansas Adjusted Gross Income \$ \_\_\_\_\_ plus Federal Earned Income Credit \$ \_\_\_\_\_. Enter the total.
5. All taxable income other than wages and pensions not included in Line 4. Do not subtract net operating losses and capital losses.
6. Total Social Security and SSI benefits, including Medicare deductions, received in 2008 (do not include disability payments from Social Security or SSI)
7. Railroad Retirement benefits and all other pensions, annuities, and veterans benefits (do not include disability payments from Veterans and Railroad Retirement).
8. TAF payments, general assistance, worker's compensation, grants and scholarships
9. All other income, including the income of others who resided with you at any time during 2008.
10. TOTAL HOUSEHOLD INCOME. Add lines 4 through 9. If line 10 is more than \$16,800, you do not qualify for a refund.

Grid for household income amounts

Refund

11. General property taxes paid timely in 2008 (see instructions on the back of this form).

Grid for property taxes and refund amount

12. PROPERTY TAX REFUND. Multiply the amount on line 11 by 45% (.45). This is the amount of your refund. Important: If you filed Form ELG with your county, your refund will be reduced by the ELG amount applied to the first half of your 2008 property tax. See page 19.

Mark this box if you wish to participate in the Homestead Refund Advancement Program (see instructions, page 20)

Signature

I authorize the Director of Taxation or the Director's designee to discuss my K-40PT with my preparer.

I declare under the penalties of perjury that to the best of my knowledge and belief, this is a true, correct and complete claim.

Claimant's signature

Date

Signature of preparer other than claimant

Preparer's phone number

IMPORTANT: Please allow 10 to 12 weeks to process your refund.

PLEASE COMPLETE THE BACK OF THIS FORM

Grid for back of form

Excluded Income

Providing this information should speed the processing of your claim. Income reported here should not be included on line 8 of this form.

13. Enter in the spaces provided the annual amount of all other income not included as household income on line 8:

|   |  |  |  |  |  |    |  |  |  |  |  |  |    |    |
|---|--|--|--|--|--|----|--|--|--|--|--|--|----|----|
| (a) Food Stamps . . . . . \$                                    |  |  |  |  |  | 00 | (b) Nongovernmental Gifts . . . . . \$   |  |  |  |  |  |    | 00 |
| (c) Child Support . . . . . \$                                  |  |  |  |  |  | 00 | (d) Settlements (lump sum) . . . . . \$  |  |  |  |  |  |    | 00 |
| (e) Personal and Student Loans . . \$                           |  |  |  |  |  | 00 | (f) SSI, Social Security, Veterans<br>or Railroad Disability . . . . . \$<br>(enclose documentation) |  |  |  |  |  |    | 00 |
| (g) Other (See instructions on page 17): Source _____ Amount \$ |  |  |  |  |  | 00 |  |  |  |  |  |  | 00 |    |

Members of Household

14. List the names of ALL persons who resided in your household at any time during 2008. Specify the number of months they lived with you and report their portion of income that is included in total household income on line 10 of this form.

| Name | Number of months resided in household | Their portion of income that is included on line 10 | Social Security Number |
|------|---------------------------------------|---|------------------------|
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |
|      |                                       | \$ 00   |                        |

# INSTRUCTIONS