

REAL PROPERTY TAX CREDIT FOR HOMEOWNERS

INCOME OF ALL TITLEHOLDERS

LIST NAMES AND INCOME OF ALL TITLEHOLDERS

Last Name	First Name	Middle Name	INCOME From Worksheet (page 3)
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
_____	_____	_____	_____
TOTAL COMBINED GROSS INCOME OF ALL OWNERS ON TITLE			\$ _____

\$60,000 INCOME LIMIT

Is the "TOTAL COMBINED INCOME OF ALL OWNERS ON TITLE" in Section D above greater than \$60,000?
 ___ YES..... STOP. You do not qualify for the credit.
 ___ NO

AFFIDAVIT AND CERTIFICATION

I (we) certify, under the penalty of law, that (1) the statements made in this claim and the accompanying documents are true, correct and complete to the best of my knowledge, (2) I (we) shall continue to qualify for a home exemption under ROH Section 8-10.4 throughout the tax year in which the credit is applied, (3) none of the titleholders owns any other real property anywhere during the applicable tax year and (4) none of the titleholders have violated ROH Section 8-13.5. If I (we) cease to qualify for the tax credit, I (we) must report the change(s) to the Director of Budget and Fiscal Services. I (we) understand that any misstatement of facts will be grounds for disqualification and penalties.

All owners on title must sign below.

_____ Signature	_____ Date	_____ Signature	_____ Date
_____ Signature	_____ Date	_____ Signature	_____ Date

CONTACT PERSON

If we have questions on your application and someone other than yourself should be contacted, please include the information below.

This hereby authorizes our office to contact the following person(s) other than yourself, regarding this application for Real Property Tax Credit for Homeowners, Tax Year 2020-2021.

_____ Name	_____ Relationship to Owner	
_____ Address	_____ Phone Number	_____ Email Address

**REMINDER: THE DEADLINE TO FILE THIS APPLICATION IS SEPTEMBER 30, 2019.
 YOU MUST FILE ANNUALLY TO RECEIVE THE TAX CREDIT**

**REAL PROPERTY TAX CREDIT FOR HOMEOWNERS
INCOME AND DOCUMENTS WORKSHEET**

All Titleholders must complete this form

			XXX-XX-	
Last Name	First	Middle	Soc. Sec. No. (last 4 digits only)	Date of Birth
				XXX-XX-
Spouse's Last Name	First	Middle	Soc. Sec. No. (last 4 digits only)	Date of Birth

IF YOU FILED A FEDERAL INCOME TAX RETURN, YOU MUST COMPLETE THIS SECTION

Submit the following required documents with your application:

1. **Tax Return Transcript for 2018** from the Internal Revenue Service (instructions on page 4)
2. **W2 for 2018**, (If you worked in 2018 and received a W2)

We reserve the right to request any other income document to verify your income.

List the gross amount of all income you received in 2018.

Type of Income	\$ Gross Income	Type of Income	\$ Gross Income
Wages		Social Security/SSI Benefits	
Interest: Taxable & Tax Exempt		Veterans Disability Benefits	
Dividends		Alimony Debt Write-Off	
Business Profit/Loss		Rents/Royalties	
Capital Gains/losses		State Tax Refund	
Pension & Annuities		Gambling Winnings	
IRA Distribution (Gross Amount)		List Other Income:	
Income of all titleholders cannot exceed \$60,000		TOTAL INCOME \$	

IF YOU DID NOT FILE A FEDERAL INCOME TAX RETURN, YOU MUST COMPLETE THIS SECTION

1. You must submit all income documents such as SSA1099, 1099's, W-2, Etc.
2. If you filed a State of Hawaii Tax Return, you must also submit a copy of the return.

We reserve the right to request any other income document to verify your income.

List the gross amount of all income you received in 2018.

Type of Income	\$ Gross Income	Type of Income	\$ Gross Income
Wages		Social Security/SSI Benefits	
Interest: Taxable & Tax Exempt		Veterans Disability Benefits	
Dividends		Alimony Debt Write-Off	
Business Profit/Loss		Rents/Royalties	
Capital Gains/losses		State Tax Refund	
Pension & Annuities		Gambling Winnings	
IRA Distribution		Other Income:	
Income of all titleholders cannot exceed \$60,000		TOTAL INCOME \$	

ALL APPLICANTS MUST SIGN THE STATEMENT BELOW

Revised Ordinance of Honolulu Sec. 8-13.5 (a) (1 & 2)

Any person who files a fraudulent application or attests to any false statement with the intent to defraud the city or evade the payment of real property taxes or any part thereof; or in any manner intentionally deceives or attempts to deceive the city, shall be guilty of a violation and be subject to a criminal fine of not more than \$2,000, in addition to being responsible for paying any outstanding taxes interest and penalties. Please sign and date.

Signature and date

Signature and date

Signature and date

HOW TO OBTAIN AN IRS TRANSCRIPT OF YOUR 2018 TAX RETURN

Transcripts are provided by the IRS at no charge, and mailed to your home

OPTION 1: REQUEST YOUR TRANSCRIPT BY PHONE (Receive it in 5 to 10 days)

Call 1-800-908-9946. You will get a recorded message. When you hear the messages listed below, press the number next to it or enter the information requested. ***Keep this script in front of you as you place your call.***

<u>Step</u>	<u>When you hear the message below</u>	<u>Press or enter</u>
1	To continue in English, press 1.....	Press 1
2	Please enter the Social Security number for which you are calling	Soc. Sec. No.
3	The Social Sec. No. you entered was ___ if this is correct, press 1 now	Press 1
4	To verify your address, please enter the numbers of your street address. Do not enter letters or fractions (If your street number has a dash “-“ such as 45-2000, enter only the 45).....	Street No.

Listen to the recorded information regarding transcript. Wait until you hear Step 5.

5	To receive a transcript of your tax return press 2	Press 2
6	Please enter the year for which you would like information.....	2018
7	The year you entered is 2018, if this is correct press 1.....	Press 1

Disregard message about a 10 digit customer file number. Wait to hear step 8.

8	You have requested a transcript of your 2018 tax return, if this is correct press 1.....	Press 1
9	To end press 3.....	Press 3

OPTION 2: GET A TRANSCRIPT BY MAIL AT: www.irs.gov

You can order your tax return transcript at <http://www.irs.gov> and have it be mailed to your address on record. Visit <http://www.irs.gov>. Under **Tools**, click on **Get a Tax Transcript by Mail**. To have your transcript mailed to you, click on **“Get Transcript by MAIL”**. **Note:** IRS will not mail transcripts to an address other than the one they have on file.

OPTION 3: REQUEST YOUR TRANSCRIPT FROM THE LOCAL IRS OFFICE

You must make an appointment before going to the IRS Office.

Call 1-844-545-5640 or go to Honolulu.appointment@irs.gov to make an appointment

Go to the IRS Taxpayer Assistance Center located in the Prince Kuhio Federal Building at 300 Ala Moana Blvd. (corner of Punchbowl & Ala Moana). The person filing the tax return must be present with proper ID. Third party may also pick up your transcript with form 4506T-EZ with proper ID. Office hours: Monday – Friday 8:30 – 4:30 p.m.

**If you encounter problems in ordering your IRS Tax Return Transcript,
Please call the Tax Relief Office at (808) 768-3205**

Before submitting your transcript to the Tax Relief Office, please print your full name on the upper right hand corner of the transcript.

DEADLINE TO FILE APPLICATION SEPTEMBER 30, 2019

You must file annually to continue receiving the tax credit