

**NAZARETH AREA SCHOOL DISTRICT
PROPERTY TAX REBATE PROGRAM**

FILING PACKET

FOR FILING 2010-11 SCHOOL DISTRICT PROPERTY TAX CLAIMS

MUST FILE BETWEEN JULY 1, 2011 AND APRIL 30, 2012

This Packet is to be used for filing 2010-11 school property tax rebate claims.

This packet includes the following:

- **Form TRCF-1000 (Page 2 and Page 3)**
- **Filing Checklist**
- **Question and Answer Guide**

Please Print or Type the Information Below. This Form Must Be Filed Between July 1, 2011 and April 30, 2012

PART I - CLAIMANT INFORMATION

Claimant's Name	Spouse's Name
<input type="text"/>	<input type="text"/>
Claimant's Social Security Number	Spouse's Social Security Number
<input type="text"/>	<input type="text"/>
Street Number, P.O. Box; Apartment Number, Suite; RR Number, etc.	
<input type="text"/>	
City, State & ZIP Code	
<input type="text"/>	
Claimant's Date of Birth	Spouse's Date of Birth
<input type="text"/>	<input type="text"/>
Daytime Telephone Number	Municipality of Residence
<input type="text"/>	<input type="text"/>

PART II - FILING STATUS

1. I certify that I am: (Check One Box Only)
- A. A Claimant, age 65 or older as of December 31, 2010.
 - B. A Claimant under age 65 with a spouse age 65 or older as of December 31, 2010.
 - C. A Widow or Widower, age 50 to 64 as of December 31, 2010.
 - D. Permanently Disabled, age 18 to 64 During 2010.

PART III - SIGN & DATE

CLAIMANT: I declare that this claim is true, correct and complete and to the best of my knowledge and belief, and 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's Signature & Date	Preparer's Signature, Date & Phone Number
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>
<input type="text"/>	<input type="text"/>

A signed copy of Form PA-1000 for 2010, a copy of your PA rebate check (that was received after July 1, 2011) or copy of bank statement showing direct deposit of the state rebate funds you received and a copy of your received 2010-2011 school property tax bill must be attached to this form in order to be eligible to receive a property tax rebate.

**IN ORDER TO QUALIFY FOR THE SCHOOL DISTRICT REBATE PROGRAM
YOU MUST HAVE RECEIVED A REBATE FROM THE PA DEPT. OF REVENUE!**

**NAZARETH AREA SCHOOL DISTRICT
PROPERTY TAX REBATE WORKSHEET
FOR 2010-2011 SCHOOL DISTRICT TAXES PAID
MUST FILE BETWEEN JULY 1, 2011 AND APRIL 30, 2012**

A. Total Income of Claimant & Spouse(if married)
(Use *PA-1000 2010 Line 12* for Information)

B. 2010-2011 School Property Taxes Paid
(Per copy of Receipted School 2010-2011 Real Estate Tax Bill)

C. 2010 *Pennsylvania* Property Tax Rebate

*****REBATE WILL BE CALCULATED BY THE SCHOOL DISTRICT*****

NAZARETH AREA SCHOOL DISTRICT PROPERTY TAX REBATE PROGRAM

FILING CHECKLIST

FOR FILING 2010-11 CLAIMS

Did you remember to do the following?

- **Sign & date the rebate Form TRCF-1000?**
(Page 2 and Page 3)
- **Attach a signed copy of your PA-1000 for 2010?**
- **Attach a copy of your PA 2010 Rebate check received in 2011 or bank statement showing direct deposit of the state rebate funds received?**
- **Attach a copy of your receipted 2010-11 school real estate tax bill?**

Nazareth Area School District Property Tax Rebate Program

Question & Answer Guide

For Filing 2010-11 School District Property Tax Claims

Must File Between July 1, 2011 and April 30, 2012

Q. Who can file a Property Tax Rebate Claim:

A. The Property Tax Rebate is based on the 2010-11 school district property taxes paid during the school year 2010-11. To file for a Property Tax Rebate:

- You must have **owned and occupied a residence** within the Nazareth Area School District during the 2010-11 school year.

You or your spouse must have been at least 65 years old as of December 31, 2010.

or

You were a widow or widower during all or part of 2010 and must have been 50 years or older as of December 31, 2010.

or

You were permanently disabled during all or part of 2010, 18 years or older during 2010, and were unable to work because of a medical determined physical or mental disability.

- Your total 2010 household income, including your spouse's must have been \$35,000 or less. **Note: Fifty percent (50%) of social security/railroad retirement income shall be excluded in determining income limits.**
- You or someone on your behalf must have paid the school district taxes on the residence for 2010-11. The payment must have been made on or before the date of filing the claim.
- Your 2010-11 School Real Estate Taxes must have been paid in full before March 11, 2011. **You can NOT apply for the rebate if your 2010-2011 school real estate taxes were delinquent.**
- Only one member of each household may file a claim even if more than one person is qualified to receive a rebate.

Q. Did you remember to file your Pennsylvania State Property Tax Rebate?

A. You may be eligible to file a Property Tax Rebate with the Pennsylvania Department of Revenue. To obtain this rebate, an applicant must file Form PA-1000 – “Pennsylvania Property Tax or Rent Rebate”. **A signed copy of this form is required to be filed with your Nazareth Area School District Rebate Application (TCRF-1000).** You may obtain Form PA-1000 by calling (800) 362-2050 or by visiting the Pennsylvania Department of Revenue’s web site www.revenue.state.pa.us. In addition, you may request Form PA-1000 by writing to:

Pennsylvania Department of Revenue
Tax Forms Service Unit
711 Gibson Blvd.
Harrisburg, PA 17104-3200

*****You must apply for and receive a rebate from the state in order to qualify for our program*****

Q. Can I file a claim form for someone who has recently died?

A. You may file a claim for an eligible claimant, who died after December 31, 2010. If the claimant died during 2010, you may not file a claim. The law governing the Property Tax Rebate Program requires that a claimant must have lived for all of 2010 in order to receive a Rebate.

If you are filing a claim for an eligible decedent, please include “Estate of “before the claimant’s name.

Q. What do I need to attach to my form to claim a property tax rebate?

A. You will need to produce a copy of your **receipted 2010-2011 school tax bill** for the year claimed. Canceled checks are not acceptable. If your name does not appear on the tax bill, proof of ownership must be submitted. For example, a copy of deed or a copy of the trust, will, or decree of distribution if the property was inherited. If the address is not on the receipted bill or mortgage statement, a letter from your tax collector or mortgage company verifying your home address must be submitted.

You also must submit a signed copy of Form PA-1000 “Property Tax and Rent Rebate Program” 2010 application as submitted to the Pennsylvania Department of Revenue and a copy of the State rebate check or bank statement showing direct deposit of the state rebate funds that you received.

Copies of Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, SSA-1099 or copies of your federal income tax return or your PA tax return for the claim year are not required when filing your claim form. However, copies of these forms may be required to be submitted to substantiate your income if your return is selected for audit purposes.

Q. What is the total amount I can be eligible to receive as a rebate?

A. The total amount that you may be eligible to receive as a rebate is \$650. The school district rebate is based on **school district property taxes only**. The maximum rebate will be equal to the State rebate for school district property taxes only or \$650, whichever is less. The amount of the State and School rebates cannot exceed the 2010-2011 school real estate tax bill. If this happens, the school rebate will be reduced to equal, but not exceed the school real estate bill.

Q. If I am eligible, how do I obtain my tax rebate?

A. All eligible taxpayers must file a Tax Rebate Claim Form (TRCF-1000) with the District and include a signed copy of the PA-1000 for 2010, a copy of your State rebate check or copy of bank statement showing direct deposit of the state rebate funds you received, and a copy of a receipted 2010-11 school tax bill. Tax Rebate Claim Form must be signed and dated and sent in by the appropriate deadline to be eligible to receive a rebate.

YOU MUST BE APPROVED BY THE STATE FOR THEIR REBATE BEFORE YOU CAN BE ELIGIBLE TO RECEIVE THE SCHOOL DISTRICT'S REBATE!!

Q. When do I file my tax rebate claim form? Is there a deadline?

A. Tax Rebate Claim Form (TRCF) must be filed between July 1, 2011 and April 30, 2012. **No Tax Rebate Claim Forms will be accepted AFTER April 30, 2012 for 2010-11 rebate claims.**

Q. Where do I send my tax rebate claim form?

A. Tax rebate claim form (TRCF-1000) and supporting documents should be mailed to the following address:

Nazareth Area School District
District Office – Attn: Bookkeeper
One Education Plaza
Nazareth, PA 18064-2379

Q. Are there any penalties for fraudulent claims to obtain a tax rebate?

A. In any case in which a Tax Rebate Claim form (TRCF-1000) is excessive and was filed with fraudulent intent, the claim shall be disallowed in full and a penalty of twenty-five per cent (25%) of the entire amount claimed shall be imposed. The penalty and the amount of the disallowed claim, if the claim has already been paid, shall bear interest at the rate of one-half (1/2) of one-percent (1%) per month from the date of the claim until repaid. The claimant and any person who assisted in the preparation and or filling of a fraudulent claim shall be guilty of a misdemeanor, and upon conviction thereof, shall be sentenced to **pay a fine not exceeding one thousand dollars (\$1,000)**, or undergo imprisonment not exceeding one year, or both. A claim shall be disallowed if the claimant received title to the residence primarily for the purpose of receiving a property tax rebate claim.

Q. If you have any questions, is there someone I can contact?

A. If you have any questions, you can call the Bookkeeper at (610) 759-1170, Ext. 1117
July and August - Monday through Thursday, 8:30 a.m. to 3:30 p.m.
September through April - Monday through Friday, 8:30 a.m. to 3:30 p.m.

Q. Where can I get a Rebate Form (TCRF-1000)?

A. You can obtain the forms at the District Tax Office at One Education Plaza, Nazareth, PA, 18064. In addition you may visit the District's web site at www.nazarethasd.k12.pa.us or obtain forms at your local tax collector's office and also at your state representative's office.

Representative Joe Emrick
2165 Mt. Bethel Highway
Mt. Bethel, PA 18343
570-897-0401
610-614-1312

Representative Marcia Hahn
354 W. Moorestown Road
Nazareth, PA 18064
610-746-2100

Income Eligibility

Household Income	Allowed Rebate (over amount of PA rebate available)
	Maximum Rebate (total rebates received not to exceed School District Real Estate Taxes paid)
\$ 0 - \$ 8,000	\$650
\$8,001 - \$15,000	\$500
\$15,001 - \$18,000	\$300
\$18,001 - \$35,000	\$250
Over \$35,000	\$ 0