**Northside Property Tax Relief Program**

For the last ten years or more, Northside neighbors, many of whom have lived here for decades, have faced rapidly increasing property taxes. This year, the Jackson Center is offering small grants (~$300-$1000) to assist with property taxes for aging, long-term, low-moderate income households in Northside & Pine Knolls.  The goal of this program is to help neighbors stay rooted in this community.   These *limited funds* will be available in 2016 and 2017. **This Property Tax Relief Program will prioritize our elderly neighbors**, who are mostly on a fixed income, and who are still facing a burden even if they qualify for and receive current relief strategies such as the Homestead Exemption and Circuit Breaker.

**Eligibility\***:

* Homeowners with a household income less than or equal to (< or =) 80% Area Median Income, defined as the following:
  + For a household of one, less than or equal to $39,600 per year.
  + For a household of two, less than or equal to $45,250 per year.
  + For a household of three, less than or equal to $50,900 per year.
  + For a household of four, less than or equal to $56,550 per year.
  + For a household of five, less than or equal to $61,100 per year.
* \*All applicants will need to have participated in or hosted a “Keeping your house a home: preservation tools” discussion by December 1. This 1.5-hour interactive workshop, developed by neighborhood leaders and civil rights attorneys, shares many additional tools and resources that can keep a house a home: property tax resources, home repair programs, legal and financial tools to help ensure the future you want for your home. There may be other ways to further reduce your house costs or property tax burden, and we want to make sure these resources are shared widely (and hope you will share additional ones you know about too). Read more about this on page 5.

**Priority Households (Limited funds available, attention will be given to the following first):**

* At least one **homeowner** 62 years of age or older *and/or* disabled.
* Homes in which at least one member of the household has lived here more than 10 years.
* Homeowners at a lower income or paying a large percentage of income to property taxes.
* Property taxes are current through 2015 or on a payment plan. *If you need help catching up on back taxes, please contact the Jackson Center to discuss options.*

**Application**: Fill out the attached application and return it between now and October 1st to the Jackson Center (by hand or by mail).  Applications will be prioritized by age of owner, tenure in the neighborhood, and level of tax burden (taxes as % of income). Call us with any questions!

**Estimated Range of Assistance**: ~$300-$1000 per household.

**Disbursement of Funds:** All applicants will be notified by October 15th of your eligibility and the amount of the property tax grant available for your household. At that point, Jackson Center staff will contact you to finalize a date for “Keeping a House a Home: Preservation Tools” workshop or work with you to host a workshop in your home by December 1. Once the workshop is completed, grant funds will be paid directly to Orange County Tax Assessor on behalf of owner via certified check.

*\*If you are in need and miss the application window, please contact the Jackson Center*

**PROPERTY TAX SUPPORT APPLICATION:**

**Instructions**: Complete this form fully, and submit it to the Jackson Center with income verification. Your private information is 100% confidential; all sensitive information will be shredded once referral to other programs is complete. As relevant, the Jackson Center will provide you with applications to other home retention & property tax programs for which you may qualify.

DATE  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

APPPLICANT’S NAME \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

BIRTHDATE OF APPLICANT: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

STREET ADDRESS \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

                                   \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TELEPHONE #       \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

TOTAL NUMBER OF PERSONS LIVING IN HOUSEHOLD AS THEIR PRIMARY RESIDENCE   \_\_\_\_\_\_\_\_\_\_\_\_\_

|  |  |
| --- | --- |
| Name(s) of all additional permanent household members | Birthdate |
|  |  |
|  |  |
|  |  |
|  |  |

ARE YOU AN OWNER OCCUPANT OF YOUR HOME?    \_\_\_\_\_Yes            \_\_\_\_\_\_No

DO YOU HAVE A RECORDED DEED IN YOUR NAME OR THE NAME OF A FAMILY MEMBER?  \_\_\_\_Yes       \_\_\_\_\_No

WHAT YEAR DID YOU\* MOVE INTO YOUR HOME? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*\*for household member who has been here longest*

\*HOW LONG HAVE YOU LIVED IN NORTHSIDE? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

*\*please list total years of resident who has been here longest*

IS ANY PERSON IN THE HOUSEHOLD DISABLED?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

     If yes, what is his/her/their disability, and is that person receiving disability benefits? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ARE THERE ANY VETERANS IN YOUR HOUSEHOLD? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

HOW DID YOU HEAR ABOUT THIS PROPERTY TAX PROGRAM?  \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

FEEL FREE TO USE THE SPACE BELOW TO TELL US ABOUT YOUR HOUSEHOLD – your history, neighborhood connection, why living in Northside is important, etc. (this question isn’t required):

**PART II: INCOME AND PROPERTY TAX INFORMATION:**

TOTAL HOUSEHOLD ANNUAL INCOME (Fill out chart on next page to get this #): \_\_\_\_\_\_\_\_\_\_\_\_

2016 PROPERTY TAX BILL AMOUNT (please include a copy): \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

ARE YOU CURRENT ON YOUR PROPERTY TAXES (through 2015)? \_\_\_\_\_\_\_\_\_\_\_\_\_\_

IF NOT, ARE YOU ON A PAYMENT PLAN? \_\_\_\_\_\_\_\_\_\_\_\_

If yes, please describe: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

DO YOU HAVE A MORTGAGE ON YOUR HOME? \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

If yes, are your taxes through escrow (i.e. through your mortgage company?): \_\_\_\_\_

**PLEASE FILL OUT THE INCOME CHART ON THE FOLLOWING PAGE!**

**2016 Income Verification Form**

**Calculating Household Income**

In order to calculate your household’s income, please fill out the worksheet below with the pre-tax income of each person in the house. If someone does not have any income, write their name in the first column and “none” under income source.

**The following sources of income should be considered when calculating total household income:**

1. Wages, salaries, tips, commissions, etc. (except full-time students);

2. Self-employment income from own non-farm business, including proprietorships and partnerships (except full-time students);

3. Interest, dividends, net rental income, or income from estates or trusts;

4. Social Security or railroad retirement;

5. Supplemental Security Income, Aid to Families with Dependent Children, or other public assistance or public welfare programs;

6. Retirement, survivor, or disability pensions; and

7. Any other sources of income received regularly, including Veterans’ (VA) payments, unemployment compensation, child support and alimony.

**Household Income Worksheet**

|  |  |  |  |
| --- | --- | --- | --- |
| **List ALL Household Members**  **(Repeat household members with multiple sources of income for each source)** | **Income Source** | **Monthly Income** | **Annual Income** |
| 1. |  |  |  |
| 2. |  |  |  |
| 3. |  |  |  |
| 4. |  |  |  |
| 5. |  |  |  |
| 6. |  |  |  |
| 7. |  |  |  |
| 8. |  |  |  |
|  | | | **Total Annual Income:** |

Household members are those who live in the same home as their primary residence.

**2016 Income Verification Form, continued**

If possible, to speed up the referral process, **please attach one or more documents verifying all sources of income in the household**. These documents can include the following, listed in order from most to least useful:

1. Most recent income tax returns
2. Annual social security statements
3. Other retirement income statements
4. Pay stubs
5. Monthly bank statements,
6. Other documents showing your full pre-tax income.

**I hereby certify that the above information is complete and accurate to the best of my knowledge**.  The income estimate includes **income for all household members**.  I understand that I may be required to submit additional documentation.

\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_ \_\_\_\_\_\_\_\_\_\_\_\_\_\_                \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Applicant’s Signature                           Date

**PART III: “KEEPING YOUR HOUSE A HOME: PRESERVATION TOOLS” Workshop**

*\*\*All eligible applicants will need to have participated in or hosted a “Keeping Your House A Home: Preservation Tools” workshop by December 1.*

**What is this workshop?** This 1.5-hour interactive workshop, developed by neighborhood leaders and civil rights attorneys, shares many additional tools and resources that can keep a house a home: property tax resources, home repair programs, legal and financial tools to help ensure the future you want for your home. In this workshop, we discuss the values of homes in the neighborhood, walk through tools that can be used to ensure the future you want for your home, and discuss existing resources and programs that help families stay rooted in our community and ways residents can help shape neighborhood outcomes. The workshop is designed to be a small group discussion because many neighbors know of tools others do not. This workshop does not require any private information to be shared.

**What does participation require?** You can simply participate in a workshop hosted at the Jackson Center. This would require you to sign up for one of the sessions below, attend at the designated time, and participate for a 1.5 hour workshop/discussion.

**What does hosting a workshop involve?** We have had several neighbors who have invited a few of their neighbors to their homes and hosted the workshop along with Jackson Center staff. This provides an opportunity to ensure the discussion is with neighbors you know well. We have had other neighbors who are homebound or prefer privacy. These neighbors can also host a private workshop at their homes. If you are interested in having the workshop at your home, please check the box below to host and we will be in touch with you to schedule this in October/November.

**PART III CONTINUED: “KEEPING YOUR HOUSE A HOME: PRESERVATION TOOLS”**

\*see prior page for more information

**Why is this workshop required?** The goal of this property tax relief program is to assist neighbors with the rising costs of living and to help neighbors stay here who wish to stay here. There are many other additional resources, many of which are more substantial and permanent than our grant funds. We want to make sure all of these resources are shared and mobilized. This also gives us a chance to learn about new tools from neighbors as well.

**Please check at least one option below:**

\_\_\_ Option 1: I prefer to participate in the workshop & small group discussion at the Jackson Center

If you checked here, please check all days/times below that might be possible for you (we will call to schedule an exact date with you):

\_\_\_ Tuesday between 3-5 pm in October/November

\_\_\_ Thursday between 10 am-12 pm in October/November (other than Thanksgiving)

\_\_\_ Thursday between 4-6 pm in October/November (other than Thanksgiving)

\_\_\_ Other – please list ideal times: \_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

\_\_\_ Option 2: I am interested in hosting a workshop at my home. Please contact me to discuss this option.

**FINAL APPLICATION CHECKLIST:**

Please turn in this application to the Jackson Center, attention Hudson Vaughan. You can bring it in or mail it (contact information at bottom of page).

APPLICATION COMPONENT: COMPLETED (X):

|  |  |
| --- | --- |
| Application Part 1 (general and contact information) |  |
| Application Part 2 (Income and Property tax information) |  |
| Application Part 3 (Keeping your House a Home Sign-up) |  |
| Attachments for verification of income |  |
| Copy of Property Tax Bill |  |