



ALL INFORMATION DISCLOSED WILL REMAIN STRICTLY
CONFIDENTIAL.

MONTROSE TOWNSHIP 2021 POVERTY EXEMPTION APPLICATION

The Board of Review may consider a poverty exemption outside of the established guidelines when a property owner can prove that they have situations that effect their household income. Poverty Exemption applications must be filed **ANNUALLY** with the Montrose Township Board of Review. **ALL APPLICANTS MUST APPEAR IN PERSON BEFORE THE BOARD OF REVIEW.** Applicants **MUST BE OWNERS** of homestead property, and provide complete copies of the items below to the Board of Review. The Board of Review will consider income according to Federal Poverty Income Standards, revenue and non-revenue producing assets as well as other available property tax relief such as the Michigan Homestead (MI-1040CR) Income Tax Credit.

The Montrose Township Board is required by Section 7u of the General Property Tax Act, Public Act 206 of 1893 (MCL 211.7u), to adopt guidelines for poverty exemptions, the following guidelines have been adopted by the Township Board for the Board of Review to implement. The guidelines shall include but not be limited to the specific income and asset levels of the claimant and all persons residing in the household, including any property tax credit returns, filed in the current or immediately preceding year.

To be eligible, a person shall do all the following on an annual basis:

1) Be an owner of and occupy as a homestead the property for which an exemption is requested. A property is defined by a parcel number on the assessment and or tax roll for the Township and is recorded with a "principal residence exemption", which includes qualified agricultural property.

2) File a claim with the board of review or supervisor, accompanied by federal and state income tax returns, complete with W-2's for all persons residing in the homestead, in the immediately preceding year or in the current year. **PROVIDING COPIES OF INCOME TAX RETURNS IS REQUIRED FOR THE PROPERTY OWNER FILING THE EXEMPTION APPLICATION. For all other persons residing in the homestead the law does allow for the filing of an affidavit(Form 4988 attached) attesting that a taxpayer does not file income tax returns. The law requires the applicant to file and produce an income tax return even if that return is a zero filing.**

End of year Social Security and/or Pension statement from all household members.

End of year statement of benefits from any Federal or State Aid Programs, such as ADC, GA, SSI, VA, etc., from all household members.

Statement of Unemployment benefits received from all household members.

Bank or Credit Union statements reflecting interest earned from all household members.

Statements of Income received from dividends, net rental income, net royalties, Estate or Trust Funds and net gambling lottery winnings.

Statements of alimony, child support, and military family allotments or other regular support from an absent family member or someone not living in the household.

3) Produce a valid drivers' license or other form of identification if requested.

4) Produce a deed, land contract, or other evidence of ownership of the property for which an exemption is requested if requested.

5) Meet the federal poverty income guidelines as defined and determined annually by the US Department of Health and Services.

6) Complete the attached application along with Form 5739 (Affirmation of Ownership and Occupancy) for an exemption in its entirety and file said application prior to the last day of the Board of Review.

7) Appear in person at the Board of Review and sign the application in the presence of the Board of Review members after an oath is administered unless infirmity or disability does not allow. In such cases, applicants may send a representative in their absence as pre-arranged.

8) Meet the following additional requirements as approved by the Township Board:

Understand that the Board of Review will consider all assets owned by petitioner in its deliberations as to whether relief should be granted.

Own total household assets (excluding the real estate value of the homestead and vehicle(s) as outlined separately herein) of less than \$25,000.

Own no more than one vehicle for each working adult whose income contributes to the financial revenue as listed in accordance with item 2) above.

Own no rental properties and or a second home or vacation home or other property.

Own no other additional assets in excess of \$25,000 in total. Additional assets to include but not be limited to, recreational vehicles such as campers, motor homes, boats or ATV vehicles, and other personal property of value.

Shall not have any stocks and or bank accounts exceeding \$5,000 in value.

Shall not have received money from the sale of any stocks and bonds, or received gifts, loans, lump-sum inheritances, one-time insurance payments, tax refunds exceeding \$2,500 in value.

In addition to the federal poverty income guidelines as mentioned in item 5) above, a hardship situation does not exist when all non-refundable property taxes do not exceed 5% of the household/owners adjusted income.

A property owner may appeal the Board of Review's decision on a poverty exemption to the Michigan Tax Tribunal. An assessor may also appeal the Board of Review's decision on a poverty exemption to the Michigan Tax Tribunal.

PA 390 of 1994 requires the Township print the Federal Poverty Income Standards. The following are the Poverty guidelines as of 12-31-20 for use in setting poverty exemption guidelines for 2021 assessments.

Size of Family Unit	Poverty Guidelines
1	\$12,760
2	\$17,240
3	\$21,720
4	\$26,200
5	\$30,680
6	\$35,160
7	\$39,640
8	\$44,120
For each additional person, add	\$4,480

MONTROSE TOWNSHIP, POVERTY EXEMPTION APPLICATION

I, _____, being the owner and resident of the property listed below, requests property tax relief for my principal residence under MCL 211.7u of the Michigan General Property Tax Act. Which states that a person who, in the judgment of the Board of Review, by reason of poverty, are unable to contribute toward the public charges is eligible for exemption in whole or in part from taxation under this Act.

FAILURE TO ANSWER ALL QUESTIONS OR TO SUBMIT ALL INFORMATION REQUESTED IS A BASIS FOR DENIAL BY THE BOARD OF REVIEW.

Applicants Name:	Age:
Address of Homestead Property:	
Parcel's PID Number:	Phone:
Marital Status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Separated <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed	

Please answer the following questions as completely as you are able.

Are you the owner of the above property? <input type="checkbox"/> Yes <input type="checkbox"/> No	
Is your home paid in full? <input type="checkbox"/> Yes <input type="checkbox"/> No	Monthly Payment:
If not, what is the unpaid balance?	
Does the above monthly payment include taxes and Insurance? <input type="checkbox"/> Yes <input type="checkbox"/> No	
How long have you lived at this address?	
Did you apply for Michigan's Homestead Property Tax Credit? <input type="checkbox"/> Yes <input type="checkbox"/> No	

Please list the names and ages of all persons living in your household.

Name	Relationship	Age

What is the combined monthly income for all members of your household? (Use the income/expense worksheet provided with this application) Please attach copies of **PROOF OF INCOME** for all persons living in the home including dependents. (Federal and State Income Tax returns, Social Security receipts, MI Property Tax Credit) \$

Do you have any assets? <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, please list all assets on page 6 of this application.
Do you or any member of your household own any other property, or are you in the process of buying any other property? If yes, please list on page 6 of this application.	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you presently employed <input type="checkbox"/> Yes <input type="checkbox"/> No	If yes, where?

Please explain why you are seeking this exemption and provide any additional information that you would like the Board to consider.

Montrose Township Poverty Exemption
Household Income/Expense and Asset Worksheet

MONTHLY EXPENSES:	Monthly Payment	Outstanding Balance
Home Mortgage	\$	\$
Home Improvement Loans	\$	\$
Electric	\$	\$
Heating	\$	\$
Other Utilities	\$	\$
	\$	\$
	\$	\$
	\$	\$
Car Payment(s)	\$	\$
Vehicle 1	\$	\$
Vehicle2	\$	\$
List all other monthly expenses, Credit Cards, Medical Bills, or any other payments		
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
	\$	\$
Total Monthly Expenses	\$	\$

MONTHLY INCOME:		
Income includes money, wages and salaries before any deductions, net receipts from self employment after deductions for business expenses, regular payments from social security, railroad retirement, unemployment, workers compensation, veterans payments, other public assistance, alimony, child support, military family allotments, private pensions, government pensions, regular insurance or annuity payments, scholarships, grants, dividends, interest, net rental income, net royalties, periodic receipts from estates or trusts, and net gambling or lottery winnings.		
Name of Recipient	Source of Income	Amount Received Monthly
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
		\$
Total Monthly Income		\$

See back to list all personal assets

ASSETS:		True Cash Value of Asset
List Bank Accounts, Retirement Savings, Stock Accounts, etc.		
Checking		\$
Savings		\$
Credit Union		\$
Stock Accounts		\$
Other Assets		
Gifts, Loans, Lump-sum Inheritances		\$
One-time Insurance Payments		\$
Tax Refunds		\$
List vehicles, boats, campers, and all other recreational vehicles, etc.		
		\$
		\$
		\$
		\$
		\$
		\$
		\$
List all Real Estate other than your Primary Residence.		
		\$
		\$
		\$
		\$

Affirmation of Ownership and Occupancy to Remain Exempt by Reason of Poverty

This form is issued under the authority of Public Act 253 of 2020.

This form is to be used to affirm ownership, occupancy, and income status. MCL 211.7u(2) provides that, to be eligible for exemption under this section, a person shall, subject to subsection (6) and (8), annually affirm that the applicant owns and occupies, as a principal residence, the property for which an exemption is requested.

PART 1: OWNER INFORMATION — Enter information for the person owning and occupying the residence.			
Owner Name		Owner Telephone Number	
Mailing Address	City	State	ZIP Code
PART 2: LEGAL DESIGNEE INFORMATION (Complete if applicable.)			
Legal Designee Name		Daytime Telephone Number	
Mailing Address	City	State	ZIP Code
PART 3: HOMESTEAD PROPERTY INFORMATION — Enter information for property in which the exemption is being claimed.			
City or Township (check the appropriate box and enter name) <input type="checkbox"/> City <input type="checkbox"/> Township <input type="checkbox"/> Village		County	
Name of Local School District			
Parcel Identification Number		Year(s) Exemption Previously Granted by Board of Review	
Homestead Property Address	City	State	ZIP Code
PART 4: AFFIRMATION OF OWNERSHIP, OCCUPANCY, AND INCOME STATUS (Check all boxes that apply.)			
<input type="checkbox"/> I own the property in which the exemption is being claimed. <input type="checkbox"/> The property in which the exemption is being claimed is used as my homestead. Homestead is generally defined as any dwelling with its land and buildings where a family makes its home. <input type="checkbox"/> After establishing initial eligibility for the exemption, my income and asset status has remained unchanged and/or I receive a fixed income solely from public assistance that is not subject to significant annual increases beyond the rate of inflation, such as federal Supplemental Security Income or Social Security disability or retirement benefits.			
PART 5: CERTIFICATION			
I hereby certify to the best of my knowledge that the information provided on this form is true and I am eligible to receive an exemption from property taxes by reason of poverty pursuant to Michigan Compiled Law, Section 211.7u.			
Owner or Legal Designee Name (print)		Signature of Owner or Legal Designee	Date
Designee must attach a letter of authority.			
LOCAL GOVERNMENT USE ONLY (DO NOT WRITE BELOW THIS LINE)			
<input type="checkbox"/> Approved <input type="checkbox"/> Denied (Attach appeal instructions and provide to owner.)		Tax Year(s) exemption will be posted to tax roll	
CERTIFICATION — I certify that, to the best of my knowledge, the information contained in this form is complete and accurate.			
Assessor Signature		Date Certified by Assessor	

Poverty Exemption Affidavit

This form is issued under authority of Public Act 206 of 1893; MCL 211.7u.

INSTRUCTIONS: When completed, this document must accompany a taxpayer's Application for Poverty Exemption filed with the supervisor or the board of review of the local unit where the property is located. MCL 211.7u provides for a whole or partial property tax exemption on the principal residence of an owner of the property by reason of poverty and the inability to contribute toward the public charges. MCL 211.7u(2)(b) requires proof of eligibility for the exemption be provided to the board of review by supplying copies of federal and state income tax returns for all persons residing in the principal residence, including property tax credit returns, or by filing an affidavit for all persons residing in the residence who were not required to file federal or state income tax returns for the current or preceding tax year.

I, _____, swear and affirm by my signature below that I reside in the principal residence that is the subject of this Application for Poverty Exemption and that for the current tax year and the preceding tax year, I was not required to file a federal or state income tax return.

Address of Principal Residence: _____

Signature of Person Making Affidavit

Date