

Form OR-PTDA

Page 1 of 3, 150-490-014 (Rev. 11-04-21 ver. 01)



For official use only
Date received at county
Date received at Revenue

2022 Property Tax Deferral Application

(ORS 311.666-701) Oregon Department of Revenue

Complete this application in full and attach a copy of your 2021-22 property tax statement and, if applicable, your Social Security Disability award letter (see instructions). File your completed application with the county assessor's office after January 1 and by April 15. See the instructions for more information.

Applicant section

Type of applicant Individual* *If individual applicant: Are you married? No Yes Spouse's name/SSN:
Joint spouse Joint other Refiling as surviving spouse. Spouse's SSN/Deferral account number:
Downsizing Add a spouse Filing as a disabled heir

Applicant's name (last, first, MI) Social Security number (SSN) Date of birth Age on April 15 Are you disabled?
Joint applicant's name (last, first, MI) Spouse Other Joint applicant's SSN Date of birth Age on April 15 Are you disabled?
Current residence address (where you currently receive your mail) City State ZIP code
Property's physical address City State ZIP code

If property's physical address is different than your current residence, explain why:

Phone Email

Additional family or friend's name

Family or friend's phone Family or friend's email

If you own a manufactured structure (mobile home), complete this section:

Model year Make Home ID number Serial number

- 1. Have you previously been approved for Property Tax Deferral on this property?
2. Does your property contain multiple units?
3. As of April 15, 2022, how many years have you owned the home?
4. Do you have a reverse mortgage that is secured by this home?
5. Is the home insured for fire and other casualty?

Insurance carrier (Required) Policy number (Required)

- 6. Is the property owned in a trust?
7. Do you owe prior years' property taxes?

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Page 2 of 3, 150-490-014
(Rev. 11-04-21 ver. 01)

Oregon Department of Revenue

Applicant's last name	First name and MI	SSN - -
Joint applicant's last name	Joint applicant's first name and MI	Joint applicant's SSN - -

Annual combined household income worksheet (Required)

1. Wages, salaries, and other pay for work	1		00
2. Interest and dividends (total taxable and nontaxable).....	2		00
3. Business net income (loss limited to \$1,000)	3		00
4. Farm net income (loss limited to \$1,000)	4		00
5. Total gain on property sales (loss limited to \$1,000)	5		00
6. Rental net income (loss limited to \$1,000)	6		00
7. Other capital gains (such as, stocks and bonds) (loss limited to \$1,000)	7		00
8. Total Social Security, Supplemental Security Income (SSI), and railroad retirement before Medicare premium deductions.....	8		00
9. Pensions and annuities before health insurance premium deductions (total taxable and nontaxable)	9		00
10. Unemployment benefits	10		00
11. Child support.....	11		00
12. Veteran's and military benefits.....	12		00
13. Gambling winnings.....	13		00
14. All other sources. Identify:	14		00
15. Your total household income. Add lines 1-14	• 15		00

If your total household income (line 15) is more than \$51,000, **Stop here.** You don't qualify for the Property Tax Deferral program.

Net worth asset worksheet (\$500,000 limit, not including your home)

1. Cash, savings, and checking account balances as of Dec. 31, 2021	1		00
2. Amount of investments in retirement plans and individual retirement accounts as of Dec. 31, 2021	2		00
3. Net worth of other investments as of Dec. 31, 2021	3		00
(Net worth means current value minus debt. Investments include real estate, trust funds, stocks, stock options, bonds, other securities, commodities, etc.)			
4. Your total assets. Add lines 1-3	• 4		00

If your total assets on line 4 exceed \$500,000, **Stop here.** You don't qualify for the Property Tax Deferral Program.

Declaration

I declare under penalties for false swearing that I have examined all documents and to the best of my knowledge, they are true, correct, and complete (ORS 305.990). I understand a lien will be placed on this property and I will be charged lien recording and/or security interest fees. I understand that 6 percent interest accrues on each years' deferred tax amount (ORS 311.666-701). I understand that heirs or other transferees receiving the homestead following my death may be found liable for any unpaid debt accrued under the deferral program.

Applicant's signature X	Date	Joint applicant's signature X	Date
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Page 3 of 3, 150-490-014
(Rev. 11-04-21 ver. 01)

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County section (Don't complete. This section will be completed by the county assessor's office.)

Property description <small>(Please choose only one selection as platted or unplatted.)</small>	Platted				
	● LOT _____ BLK _____ _____ Legal description				
Deed information	Unplatted For all unplatted properties attach a copy of the recorded deed or contract.				
	● Parcel in: T _____ R _____ SEC _____				
	As described in _____ County Containing _____ acres				
Assessor's certification	<input type="checkbox"/> Check here for split levy code		Assessor's account number	Levy code	
			Assessor's account number	Levy code	
Property described above contains		If the property contains multiple units, what is the percentage of value allocated to the taxpayer's unit (percent to be deferred)? ● _____ %			
<input type="checkbox"/> A single unit <input type="checkbox"/> Multi-units					
<input type="checkbox"/> Late filing <input type="checkbox"/> Fee paid					
Assessor's (or Assessor's designee's) signature verifying applicant is the owner of record				Date	County number
X					