Form OR-PTDA

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For official use only							
Date received at Revenue							

2023 Property Tax Deferral Application

(ORS 311.666-701)

Oregon Department of Revenue

Complete this application in full and attach a copy of your 2022-23 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 17. See the instructions for more information.

Ap	plica	nt section						
Type of applicant Individual* *If individual applicant: Are you			e's name/SSN:					
\square Joint spouse \square Joint other \square Refiling as surviving spouse.	Spouse	's SSN/Deferral account n	umber:					
☐ Downsizing ☐ Add a spouse ☐ Filing as a disabled heir				•				
Applicant's name (last, first, MI)	Socia	al Security number (SSN)	Date of birth	Age on April	15 Are you disabled?			
1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1 1			5		Yes No			
Joint applicant's name (last, first, MI) Spouse Other	Joint	applicant's SSN 	Date of birth	Age on April	15 Are you disabled? ☐ Yes ☐ No			
Current residence address (where you currently receive your mail))	City	1	State	ZIP code			
Property's physical address		City		State	ZIP code			
If property's physical address is different than your current residen	nce, exp	blain 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 sect	ion:						
Model year Make	Home	ID number	Seria	l number				
Have you previously been approved for Property Tax Deferral on this property?								
 Does your property contain multiple units? ☐ Yes ☐ No If yes, how many units? What is the purpose of the other unit(s)? 								
Describe which homestead (unit) you live in								
3. As of April 15, 2023, how many years have you ow !	ned th	e home?	years					
As of April 15, 2023, how many years have you live								
If your answer to either of the above questions is less than five years, see Form OR-PDTA Instructions. If you have been on								
deferral and feel you meet the criteria for the Downsizing Provision, contact us for the Downsizing Provision worksheet.								
4. Do you have a reverse mortgage that is secured by this home? ☐ Yes ☐ No								
If you answered "yes," to the above question Stop complete your application.	nere,	and refer to Form OF			ons before you			
5. Is the home insured for fire and other casualty? If your answer to the above question is no, Stop he	 ere. Yo	u don't qualify for the	□ Ye e Propertv Tax		rogram.			
Insurance carrier (Required)	Policy number (Req	· · · · · ·	<u>.</u>					
6. Is the property owned in a trust? If yes, attach a copy of the trust documents.			□ Ye	s 🗆 No				
 Do you owe prior years' property taxes? ☐ Yes (St 	ee <i>Delay</i>	of Foreclosure application	n) 🗆 No					



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

Joir	nt applicant's last name	Joint applicant	t's first name and MI	Joint applicant'	Joint applicant's SSN		
					_		
	Annual 2022 com	hined househ	old income workshee	et (Pequired)			
	Alliluai 2022 Coli	ibilieu liouselio	old illcollie workshed	et (nequireu)			
1.	Wages, salaries, and other pay for work		1	00			
2.	Interest and dividends (total taxable and			00			
3.	Business net income (loss limited to \$1,	•		00			
4.	Farm net income (loss limited to \$1,000	•	I	00			
5.	Total gain on property sales (loss limited	,	I	00			
6.	Rental net income (loss limited to \$1,00		I	00			
7.	Other capital gains (such as, stocks and	•		00			
8.	Total Social Security, Supplemental Sec	• •	· · · · · · · · · · · · · · · · · · ·				
	retirement before Medicare premium ded	•	I	00			
9.	Pensions and annuities before health in						
	deductions (total taxable and nontaxable		9	00			
10.	Unemployment benefits	•		00			
	Child support		I	00			
	Veteran's and military benefits			00			
	Gambling winnings			00			
			14	00			
	Your total household income. Add lines	1–14		•15	00		
	Net worth asset wo	orksheet (\$500,	,000 limit, not includi	ng your home)			
1.	Cash, savings, and checking account b	alances as of Dec.	31, 2022 1	00			
2.	Amount of investments in retirement pla	ans and					
	individual retirement accounts as of Dec			00			
3.	Net worth of other investments as of De			00			
	(Net worth means current value minus of						
	trust funds, stocks, stock options, bond			Г	00		
4.	Your total assets. Add lines 1–3			• 4 ∟	00		
If yo	our 2022 total assets on line 4 exceed \$50	00,000, Stop here. Y	ou don't qualify for the Pro	operty Tax Deferral	Program.		
		Decla	aration				
Ιd	eclare under penalties for false swearing that	t I have examined all	documents and to the best	of my knowledge, th	ney are true, correct,		
	d complete (ORS 305.990). I understand a liei						
	s. I understand that 6 percent interest accruents in the standard following the homestead following manual f		·	•			
	olicant's signature	Date	Joint applicant's signature		Date		
X			X				



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County section (Don't complete. This section will be completed by the county assessor's office.)											
Property	Platted										
description	• LOT		BLK						Legal desc	ription	
(Please Unplatted For all u		unplatted pro	perties attach a	copy of the re	ecorded deed or con	tract.					
choose only one selection	Parcel in:				R			SEC_			
as platted or		1									
unplatted.)	As describe	ed in				County	Contair	ning		acres	
Deed information	Current des		☐ Deed re	corded (date))			_			
			Document/ii	nstrument numbe	er	Microfilm number	Reel		Book/volume	Page	
	Earliest deed showing ownership by the taxpayer(s)				late)	•	Document/instrument number				
Assessor's	☐ Check here for Assessor's account number ■ Check here for						Levy code				
	split levy Assesso		essor's accou	nt number			Levy code				
certification	Property described above contains					le units, what	is the per	rcentage	_		
	☐ A single unit ☐ Multi-units			of value allocated to the taxpayer's unit (percent to be deferred)?					%		
	☐ Late filing ☐ Fee paid										
	Assessor's (or Assessor's designee's) signature verifying applicant is the owner of record Date							County no	ımber		
	V										