



Oregon

Kate Brown, Governor

Department of Revenue

955 Center St NE
Salem, OR 97301-2555
www.oregon.gov/dor

Date: February 24, 2021

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Account ID: 015307005-44

Property Tax Deferral Recertification

As a participant in the property tax deferral program, you must certify that you remain eligible every two years. Please complete the attached form, sign it, attach a copy of your most recent property tax statement, and return it to us by April 15, 2021.

If you don't submit a complete form **by April 15, 2021**, we'll make your deferral account inactive.

If your account becomes inactive, you'll be responsible for paying your property taxes to the county starting in November of this year. To reactivate your deferral account, you'll need to reapply during the regular application period January 1 through April 15.

You can submit the Property Tax Deferral Recertification form via Revenue Online at www.oregon.gov/dor, you will need your letter ID number located in the top right corner.

Please be aware that the department has partnered with Oregon Department of Human Services and the Aging and Disability Resource Connection (ADRC) to follow up with you if you do not respond timely. You may receive a follow up call from them as a reminder of your need to recertify this year.

If you have any questions, please call us. Have your letter ID number or deferral account number ready.

Deferral Unit
Property Tax Division
503-945-8348 (Salem) or 800-356-4222 (toll-free)
Fax: 503-945-8737
Email: deferral.unit@oregon.gov

Do you have questions or need help?

www.oregon.gov/dor
(503) 378-4988 or (800) 356-4222
questions.dor@oregon.gov
Contact us for ADA accommodations or assistance in other languages.

DUPLICATE

Form OR-PTD-RFPage 1 of 3, 150-490-028
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Oregon Department of Revenue



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2021 Property Tax Deferral Recertification Form**Important:** To continue to be eligible for property tax deferral, you must complete this recertification form. You may also complete this form on our website at www.oregon.gov through our Revenue Online system.

- Attach a copy of your most recent property tax statement.
- Attach a complete copy of your trust including any amendments, unless a current trust has already been submitted.
- Read the declaration, and remember to **sign, date, and return your completed form to:**

Department of Revenue, Deferral Unit, PO Box 14380, Salem OR 97309.**Program participant(s) section** 015307005-44

Participant's name (first, initial, last)	Social Security number (SSN)	Date of birth	Deferral account number
Joint participant's name (first, initial, last)	Social Security number (SSN)	Date of birth	
Current residence address (where you currently receive your mail)	City	State	ZIP code
Property's physical address	City	State	ZIP code
If the property's physical address is different than your current residence, explain why:			
Phone (Required) <input type="checkbox"/> Home <input type="checkbox"/> Cell	Email		

Required section

As of April 15, 2021, how many years will you have continuously owned the property? _____	As of April 15, 2021, how many years will you have continuously lived on the property? _____	Is the home insured for fire and other casualty? <input type="checkbox"/> Yes <input type="checkbox"/> No
Insurance carrier (Required)	Policy number (Required)	
Do you have a reverse mortgage that is secured by this home? <input type="checkbox"/> Yes <input type="checkbox"/> No	Is there a trust associated with this property? <input type="checkbox"/> Yes <input type="checkbox"/> No—If yes, include a copy if you haven't provided a current copy already.	Are you married? <input type="checkbox"/> Yes <input type="checkbox"/> No
Spouse's name (first, initial, last)—if not listed above	SSN	Phone
Spouse's residence address—if different than above	City	State ZIP code

Designated contact outside of the home/emergency

Designation by (choose one):

<input type="checkbox"/> Will <input type="checkbox"/> Trust <input type="checkbox"/> Power of Attorney <input type="checkbox"/> Friend/neighbor <input type="checkbox"/> Relative <input type="checkbox"/> Other _____	Phone _____
Designated contact (first, initial, last)	
Designate's mailing address	City State ZIP code

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Form OR-PTD-RF

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Participant's name (first, initial, last) SSN

Joint participant's name (first, initial, last) SSN

List the total 2020 combined income of all applicants and spouses living in the household. This includes income earned in other states or countries. Your income eligibility is determined by Oregon Revised Statute (ORS 311.668). Taxes won't be deferred if total 2020 household income is \$46,500 or more.

Annual combined household income worksheet (Required)

- 1. Wages, salaries, and other pay for work..... 1.
- 2. Interest and dividends (total taxable and nontaxable)..... 2.
- 3. Business net income (loss limited to \$1,000) 3.
- 4. Farm net income (loss limited to \$1,000)..... 4.
- 5. Total gain on property sales (loss limited to \$1,000)..... 5.
- 6. Rental net income (loss limited to \$1,000)..... 6.
- 7. Other capital gains [such as stocks & bonds (loss limited to \$1,000)] ... 7.
- 8. Total Social Security, Supplemental Security Income (SSI),
and railroad retirement (before Medicare premium deductions).... 8.
- 9. Pensions and annuities (total taxable and nontaxable) 9.
- 10. Unemployment benefits..... 10.
- 11. Child support 11.
- 12. Veterans' and military benefits..... 12.
- 13. Gambling winnings 13.
- 14. All other sources. Identify: _____ 14.
- 15. **Your total annual household income.** Add lines 1-14..... 15.
- 16. Was a unit of the property containing the home
used for business or rental purposes? Yes No

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List the total net worth of all applicants. Net worth means the sum of the current market value of all assets, including real property, cash, savings accounts, bonds, and other investments, after deducting outstanding liabilities. We may require verification of the information you provided in this section.

Net worth doesn't include the value of the property for which deferral is claimed, the cash value of life insurance policies on the life of an applicant, or tangible personal property owned by an applicant (such as furniture or vehicles).

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

1. Cash, savings, and checking account balances as of Dec. 31, 20201.

2. Amount of investments in retirement plans and individual retirement accounts as of Dec. 31, 2020..... 2.

3. Net worth of other investments as of Dec. 31, 2020 3.
(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.

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 that I am applying for a loan that has to be paid back with interest. I understand that 6 percent interest accrues on each year's deferred tax amount. I understand that after my death, my heirs or other transferees of my homestead may be found liable for the accrued debt under the deferral lien (ORS 311.695). I understand a lien will be placed on this property and I will be charged lien recording and/or security interest fees. (ORS 311.674).

Applicant's signature	Date	Joint applicant's signature	Date
X		X	
Authorized representative's signature	Date	Representative's name	
X			

**Department of Revenue
Deferral Unit
PO Box 14380
Salem OR 97309**

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