

Southern York County School District

P.O. Box 128, Glen Rock, Pennsylvania 17327-0128

www.sycsd.org

Telephone (717) 235-4811, Ext. 7300

Fax (717) 235-0863

2012-13 PROPERTY TAX REBATE

Complete and sign this application and return it with proof of income to the address shown above no later than May 15, 2013. If filing for the first time, provide proof of age.

TAXPAYER IDENTIFICATION	
Name:	Date of Birth:
Street Address:	City:
Phone Number:	Tax Bill #:
Spouse's Name:	Spouse's Date of Birth:

HOUSEHOLD INCOME	TOTAL
1. Social Security (50% of all benefits)	\$
2. Railroad Retirement (50% of all benefits)	\$
3. Pensions/Annuity and IRA Distributions	\$
4. Interest/Dividend Income	\$
5. Capital Gains	\$
6. Rental Income	\$
7. Net Business Income	\$
8. Other Income. Itemize the amounts received from each of the sources below.	
a. Wages and Salary	\$
b. Lottery and/or Other Prize Winnings	\$
c. Value of Inheritances, Alimony, and Spousal Support	\$
d. Public Assistance	\$
e. Unemployment Compensation	\$
f. Disability and/or Death Benefits (in excess of \$5,000)	\$
g. Gifts (in excess of \$300)	\$
Total 2012 Annual Household Income	\$
Must be \$25,000 or less for all household residents	

ATTACH PROOF OF INCOME

PROPERTY TAX REBATE CALCULATION	
A. School Tax Paid on Above Parcel for 2012-13	\$
B. Less Eligible State Rebate	\$
C. (A minus B)	\$
D. Rebate (from "Tax Rebate Schedule" listed on instructions page)	\$
E. Amount of Rebate (lesser of C or D – not to exceed \$500 or taxes paid)	\$

I declare under penalty of law that the questions answered in the above are true and correct to the best of my knowledge.

Claimant's Signature

Date

Signature of Preparer, if other than Claimant
Phone # _____

Southern York County School District Property Tax Rebate Program

Who can file for a Property Tax Rebate claim?

The Property Tax Rebate is based on the property taxes paid during the previous calendar year. To file for a Property Tax Rebate:

1. You must have owned and occupied a home in the Southern York County School District during the entire period for which you are claiming the rebate; and
2. You or your spouse must have been at least 65 years old as of December 31 of the claim year,

or

You were a widow or widower during all or part of the claim year and must have been 50 years or older as of December 31,

or

You were permanently disabled 18 years or older during all or part of the claim year. *Note:* If you applied for Social Security Disability and were denied benefits, you are not eligible for a rebate as a disabled claimant; and

3. Your total household income, including your spouse's and any other household residents, must have been \$25,000 or less. Remember to exclude one-half of your (1) Social Security benefits, (2) Supplemental Social Security Income, and (3) Tier 1 benefits from your Railroad Retirement when calculating your total household eligibility income; and
4. Owners must have paid taxes by December 31, 2012.
5. Only one member of each household may file a claim, even if more than one person is qualified to receive a rebate.

Income Eligibility & What must be included in Household income?

You must report the total household income you earned and/or received during 2012 for each category, which includes your spouse's and/or any other income earned and/or received by other household residents while living with you. The income amount must have been \$25,000 or less in 2012.

Filing for the First Time

- Provide proof of age (drivers license or birth certificate).
- If you are a widow or widower under 65, provide proof of age and your spouse's death certificate.
- If you are permanently disabled under 65, provide proof of age and your social security award letter.

Signatures

Sign and date the claim form in the space provided. The signature must match the name listed on your property tax bill. If someone other than the claimant signs the claim form, a copy of the Power of Attorney entitling that person to sign must accompany the claim form.

Mailing Instructions and Deadlines

Complete and submit one original claim form, **postmarked no later than May 15, 2013**. Send the completed form and all necessary attachments to:

**Southern York County School District
Property Tax Rebate Program
3280 Fissels Church Road
P.O. Box 128
Glen Rock, PA 17327-0128**

Restrictions

- In no event may the total tax assistance from both the School District and the Commonwealth of Pennsylvania exceed the total real estate taxes paid for any applicable year. In such cases, the tax assistance provided by the School District will be adjusted accordingly.
- Any case in which a claim application is excessive and was filed with fraudulent intent, the claim shall be disallowed in full.



**Southern York County School District
Property Tax Rebate – Instructions for Completing Application**

Lines 1 through 8 – Household Income

You must report the total household income you earned and/or received during 2012 for each category, which includes your spouse's income earned and/or income earned by other household residents while living with you. See below for the types of income you must report and the supporting documents you must submit.

Line 1 – Include ½ of your 2012 Social Security Benefits as shown in Box 5 of your benefits statement and ½ of your 2012 Supplemental Security Income (SSI). **SUBMIT A PHOTOCOPY OF YOUR SSA-1099.**

Line 2 – Include ½ of your Railroad Retirement Benefits Tier 1 Benefits. **SUBMIT A PHOTOCOPY OF YOUR RRB-1099.**

Line 3 – Include the gross amount of pensions, annuities, Individual Retirement Account distributions, and Tier 2 Railroad Retirement Benefits. **SUBMIT PHOTOCOPIES OF PENSION/ANNUITY BENEFITS STATEMENTS ALONG WITH OTHER FORMS 1099 SHOWING PENSION INCOME FOR 2012.**

Line 4 – Include interest and dividends received or credited during the year, whether or not you actually received the cash. **SUBMIT ONE OF THE FOLLOWING:**

- COPY OF YOUR FEDERAL SCHEDULE B OR PA-40 SCHEDULE A AND/OR B
- COPIES OF ANY FEDERAL FORMS 1099 YOU RECEIVED
- COPY OF THE FRONT PAGE OF YOUR PA OR FEDERAL INCOME TAX RETURN TO VERIFY THE INCOME REPORTED ON LINE 4

Line 5 – Include gains you realized from the sale of stocks, bonds, and other tangible or intangible property. The taxable gain on the sale of your principal residence must be reported.

SUBMIT A COPY OF YOUR FEDERAL SCHEDULE D, OR A COPY OF YOUR PENNSYLVANIA SCHEDULE D, OR COPIES OF ANY FEDERAL FORMS 1099 YOU RECEIVED, WHICH WILL VERIFY ANY GAINS YOU REALIZED.

Line 6 – Include net rental, royalty, and copyright income received during 2012. **SUBMIT FEDERAL OR PA SCHEDULE E.**

Line 7 – Include net income from a business, profession, or farm, and net income you realized as a partner in a partnership or a shareholder in a PA S corporation. **SUBMIT A PHOTOCOPY OF EACH FEDERAL SCHEDULE C OR F. YOU MAY ALSO SUBMIT PHOTOCOPIES OF EACH PA SCHEDULE C/F, RK-1, NRK-1, OR FEDERAL SCHEDULE K-1 THAT SHOWS YOUR INCOME FOR EACH BUSINESS.**

Other Income – Lines 8a through 8g

Use lines 8a through 8g to report all other income you and your spouse (or other household member) earned, received, and realized.

FOR EACH CATEGORY OF INCOME SHOWN BELOW, YOU MUST SUBMIT PROOF, SUCH AS PHOTOCOPIES OF FORMS W-2, DEPARTMENT OF PUBLIC WELFARE ASSISTANCE STATEMENTS, YOUR FEDERAL OR PA INCOME TAX RETURNS, AND ANY OTHER DOCUMENTS VERIFYING INCOME.

- 8a. Salaries, wages, bonuses, and commissions not included in business, profession, or farm income.
- 8b. Lottery winnings, including PA Lottery Winnings, prize winnings, and the value of other prizes
- 8c. Value of inheritance, alimony, and spousal support money
- 8d. Cash public assistance and relief
- 8e. Unemployment compensation, veterans' disability payments, workers' compensation benefits
- 8f. Gross amount of loss of time insurance benefits and proceeds except the first \$5,000 of the total death benefit payments.
- 8g. Gifts of cash or property totaling more than \$300 except gifts between members of a household.

Total Annual Household Income- Add only positive figures. Do not include losses (per state program).

Tax Rebate Schedule (Based on Income)	
If your Income Range is:	Rebate Amount:
\$0-\$15,000	\$500.00
\$15,001 - \$18,000	\$300.00
\$18,001 - \$25,000	\$250.00