

NOTICE

SAUCON VALLEY SCHOOL DISTRICT PROPERTY TAX REBATE PROGRAM

**Saucon Valley School District
2097 Polk Valley Road
Hellertown, PA 18055**

**Telephone 610-838-7001
Extension 1117**

The Saucon Valley School District is offering a property tax rebate program.

The maximum this year is \$650.00.

Any homeowner eligible to receive a Pennsylvania Property Tax Rebate is eligible to receive a District rebate. A rebate is available, upon filing an application, to a person **owning** and **residing** in a **primary residence** within the Saucon Valley School District. The District rebate is calculated on the amount of the 2021-2022 School Real Estate Taxes paid.

Rebate applications must be filed at the Business Office in the School District Administration Building, no later than April 28, 2023.

Forms are available online at www.svpanthers.org under Business Office/Taxes/Saucon Valley Property Tax Rebate and at the Saucon Valley School District Office located in the Business Office of the Administration Building, 2097 Polk Valley Road, Hellertown. Phone: 610-838-7001 Ext. 1117, and from the offices of State Representatives Robert Freeman and Milou Mackenzie. They will also assist in filling out these forms.

Robert L. Freeman
215 Northampton Street
Easton, PA 18042
Phone: 610-253-5543

Milou Mackenzie
1245 D Chestnut Street
Emmaus, PA 18049
Phone: 610-965-5830

Please Print or Type the Information Below. This Form Must Be Filed Between July 1, 2022 and April 28, 2023

PART I - CLAIMANT INFORMATION

Claimant's Name

Spouse's Name

Claimant's Social Security Number

Spouse's Social Security Number

Street Number, P.O. Box; Apartment Number, Suite; RR Number, etc.

City, State & ZIP Code

Claimant's Date of Birth

Spouse's Date of Birth

Daytime Telephone Number

Municipality of Residence

PART II - FILING STATUS

1. I certify that I am: (Check One Box Only)

- A. A Claimant, age 65 or older as of December 31, 2021.
- B. A Claimant under age 65 with a spouse age 65 or older as of December 31, 2021.
- C. A Widow or Widower, age 50 to 64 as of December 31, 2021.
- D. Permanently Disabled, age 18 to 64 During 2021.

PART III - SIGN & DATE

CLAIMANT: I declare that this claim is true, correct and complete and to the best of my knowledge and belief, and this is the only claim filed by members of my household.

PREPARER: I declare that I prepared this return and that it is to the best of my knowledge and belief, true, correct and complete.

Claimant's Signature & Date

Preparer's Signature, Date & Phone Number

A signed copy of Form PA-1000 for 2021 (2 pages), a copy of your PA rebate check (that was received after July 1, 2022) and a copy of your receipted 2021-2022 school property tax bill must be attached to this form in order to be eligible to receive a property tax rebate.

YOU MUST BE APPROVED BY THE STATE FOR THEIR REBATE BEFORE YOU ARE ELIGIBLE TO RECEIVE THE SCHOOL DISTRICT'S REBATE !!

SAUCON VALLEY SCHOOL DISTRICT
PROPERTY TAX REBATE PROGRAM

FILING CHECKLIST

FOR FILING 2021-22 SCHOOL DISTRICT PROPERTY TAX CLAIMS

MUST FILE BETWEEN JULY 1, 2022 AND APRIL 28, 2023

Sign and date the Saucon Valley School District Rebate Form - TRCF-1000 2022
(the yellow form with 2022 on top)

PA State Property Tax Rebate Form - - PA-1000 for the year ending 2021:

Copy of the completed and **signed** form that was submitted to the State.

If you do not have a copy - See your State Representative's Office for a copy

Or call 1-717-705-0598 for a copy from the state

Copy of your PA State Rebate Check dated July 2022 or later/ OR Bank Statement showing a Direct Deposit into your Bank Account

You can also obtain a letter from your state representative stating you received the PA State Rebate

PAID RECEIPT for 2021-2022 School Real Estate Tax bill for 2021-2022

Stamped Paid by tax collector OR Paid receipt from the tax collector

**3 ways to submit your
SENIOR TAX REBATE**

1. Mail your completed packet to:

Saucon Valley School District
Business Office
2097 Polk Valley Road
Hellertown, PA 18055

OR

2. Drop off your completed packet (No Contact):

Saucon Valley School District
Business Office - Lobby
2097 Polk Valley Road
Hellertown, PA 18055

OR

3. If you need help with your application:

Call to make an appointment

Monday, Tuesday, Wednesday, or Thursday Only

9:00 - 3:00

SAUCON VALLEY SCHOOL DISTRICT
PROPERTY TAX REBATE PROGRAM

QUESTION & ANSWER GUIDE

FOR FILING 2020-21 SCHOOL DISTRICT PROPERTY TAX CLAIMS
MUST FILE BETWEEN JULY 1, 2022 AND APRIL 28, 2023

Q. Who can file a property tax rebate claim?

A. The Property Tax Rebate is based on the 2021-22 school district property taxes paid during the school year 2021-22.

To file for a Property Tax Rebate:

- You must have **owned and occupied a residence** within the Saucon Valley School District during the 2021-22 school year.

You or your spouse must have been at least 65 years old as of December 31, 2021.

or

You were a widow or widower during all or part of 2021 and must have been 50 years or older as of December 31, 2021.

or

You were permanently disabled during all or part of 2021, 18 years or older during 2021, and were unable to work because of a medical determined physical or mental disability.

- Your total 2021 household income, including your spouse's, must have been \$35,000 or less. **Note: Fifty percent (50%) of social security/railroad retirement income shall be excluded in determining income limits.**
- You or someone on your behalf must have paid the school district taxes on the residence for 2021-22. The payment must have been made on or before the date of filing the claim.
- Only one member of each household may file a claim even if more than one person is qualified to receive a rebate.

Q. What is the total amount I can be eligible to receive as a rebate?

A. The total amount that you may be eligible to receive as a rebate is \$650. The school district rebate is based on school district property taxes only. The amount of the State and School rebates

cannot exceed the 2021-2022 school real estate tax bill. If this happens, the school rebate will be reduced to equal, but not exceed the school real estate bill.

Q. Can I file a claim form for someone who has recently died?

A. You may file a claim for an eligible claimant, who **died after December 31, 2021**.

You may not file a claim if the claimant **died during 2021**. The law governing the Property Tax Rebate Program requires that a claimant must have lived for all of 2021 in order to receive a rebate.

If you are filing a claim for an eligible decedent, please include *"Estate of"* before the claimant's name.

Q. What do I attach to my form to claim a property tax rebate?

A. You will need to produce a copy of your **receipted 2021-2022 school tax bill** for the year claimed. Canceled checks are not acceptable. If your name does not appear on the tax bill, proof of ownership must be submitted. For example, a copy of deed or a copy of the trust, will, or decree distribution if the property was inherited. If the address is not on the receipted bill or mortgage statement, a letter from your tax collector or mortgage company verifying your home address must be submitted.

You also must submit a signed copy of Form PA-1000 "Property Tax and Rent Rebate Program" 2020 application as submitted to the Pennsylvania Department of Revenue and a copy of the State rebate check that was issued to you.

Copies of Forms W-2, 1099-INT, 1099-DIV, 1099-R, 1099-MISC, SSA-1099 or copies of your federal income tax return or your PA tax return for the claim year are not required when filing your claim form. However, copies of these forms may be required to be submitted to substantiate your income if your return is selected for audit purposes.

Q. If I am eligible, how do I obtain my tax rebate?

A. All eligible taxpayers must file a Tax Rebate Claim Form (TRCF-1000) with the District and include a signed copy of the PA-1000 for 2021, a copy of your State rebate check, and a copy of a receipted 2021-22 school tax bill. Tax Rebate Claim Form must be signed and dated and submitted by the appropriate deadline to be eligible to receive a rebate.

NOTE: You must be approved by the State for their rebate before you can be eligible to receive the School District's rebate.

Q. When do I file my tax rebate claim form? Is there a deadline?

A. Tax Rebate Claim Form (TRCF) must be filed between July 1, 2022 and April 28, 2023. No Tax Rebate Claim Forms will be accepted AFTER April 8 2023 for 2021-22 rebate claims.

Q. Where do I send my tax rebate claim form?

A. Tax rebate claim form (TRCF-1000) and supporting documents should be mailed to the following address:

Saucon Valley School District
Business Office
2097 Polk Valley Road
Hellertown, PA 18055

Q. Are there penalties for fraudulent claims to obtain a tax rebate?

A. In any case in which a Tax Rebate Claim form (TRCF-1000) is excessive and was filed with fraudulent intent, the claim shall be disallowed in full and a penalty of twenty-five percent (25%) of the entire amount claimed shall be imposed. The penalty and the amount of the disallowed claim, if the claim has already been paid, shall bear interest at the rate of one-half (1/2) of one percent (1% per month from the date of the claim until repaid. The claimant and any person who assisted in the preparation and or filling of a fraudulent claim shall be guilty of a misdemeanor, and upon conviction thereof, shall be sentenced to **pay a fine not exceeding one thousand dollars (\$1,000)**, or undergo imprisonment not exceeding one year, or both. A claim shall be disallowed if the claimant received title to the residence primarily for the purpose of receiving a property tax rebate claim.

Q. If I have any questions, is there someone I can contact?

A. If you have any questions, call the Saucon Valley School District Business Office at (610) 838-7001, Extension 1117, Monday through Thursday, 9:00 AM to 3:00 PM.

Q. Where can I get a rebate form (TCRF-1000)?

A. Application forms can be obtained in the following ways:

- From the Saucon Valley School District Office located in the Business Office of the Administration Building, 2097 Polk Valley Road, Hellertown.
Phone: 610-838-7001Ext.1117
- From the District Web Site: www.svpanthers.org
- From the office of your State Representative:

Robert L. Freeman
215 Northampton Street
Easton, PA 18042
Phone: 610-253-5543

Milou Mackenzie
1245 D Chestnut Street
Emmaus, PA 18049
Phone: 610-965-5830

Representatives Freeman and Mackenzie will assist in filling out these forms.

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PROPERTY TAX REBATE PROGRAM

INCOME ELIGIBILITY

FOR FILING 2021-22 SCHOOL DISTRICT PROPERTY TAX CLAIMS
MUST FILE BETWEEN JULY 1, 2022 AND APRIL 28, 2023

TABLE A- OWNERS ONLY

| TOTAL INCOME From <u>Line 13</u> of your claim form | | | Your maximum rebate is |
|---|----|----------|---------------------------|
| 0 | to | \$8,000 | \$650 |
| \$8,001 | to | \$15,000 | \$500 |
| \$15,001 | to | \$18,000 | \$300 |
| \$18,001 | to | \$35,000 | \$250 |