

OSHTEMO CHARTER TOWNSHIP
POVERTY TAX EXEMPTION APPLICATION

This form should be completed if you, for reasons of poverty, are unable to pay the property taxes assessed by Oshtemo Township on your homestead residence. In applying for an exemption, you will be required to provide annually:

1. Specific income and asset information (for yourself and all individuals residing in your home);
2. Proof of your ownership (deed, land contract, or other evidence of ownership) and occupancy of the residence for which you are seeking an exemption;
3. State and Federal income tax returns (for yourself and all individuals residing in your home);
4. A valid driver's license or other legally valid form of picture identification;
5. Proof that you meet the federal poverty income standards (as annually determined by the United States Office of Management and Budget);
6. A completed application, delivered in person, to the Assessor's Office after January 1 but at least a week before the start of the March Board of Review, July Board of Review or December Board of Review of the year for which you are applying;

Additionally, you may be required to appear before the Board of Review at a public meeting to answer questions regarding your application. You may also be subject to an investigation to verify the information submitted in your application, and establish that your non-exempt assets do not exceed \$25,000.

These policies are set by the Oshtemo Charter Township Board in compliance with Michigan State Law. The Township will use criteria established in its Property Exemption Guidelines to review your application. If you have any questions, please contact the Township Assessor, or Township Attorney (www.oshtemo.org/contact/ or (269) 375-4260).

Instructions for filing a claim with the Township Supervisor:

1. Complete the following application in full, but do not sign the form.
2. Do not leave any sections blank, if you have questions regarding this form, please contact the Township Assessor's Office for guidance.
3. If you require additional space to respond to any of the questions on this form, please attach a typed response, which clearly indicates which question(s) you are providing additional information regarding.
4. Completed applications must be delivered in person to the Township Assessor a week before the start of the March Board of Review, July Board of Review or December Board of Review of the year for which you are applying.
5. Bring copies of all requested documents:
 - a. Previous year State and Federal Tax Returns;
 - b. Proof of ownership/residency/homestead for the residence for which you are requesting a tax exemption;
6. Bring the completed, unsigned, form in person to:

Oshtemo Township Hall
7275 West Main Street,
Kalamazoo, MI 49009
(296) 375-4260
7. Bring your driver's license, or other legally valid picture identification with you.
8. Sign the form when directed by the Township Assessor, and provide your ID for photocopying if requested.

POVERTY TAX EXEMPTION APPLICATION FORM

Street Address: _____

Parcel Number: 3905-_____ - _____ - _____

SECTION 1: APPLICANT INFORMATION

Name of Applicant: _____

Marital Status (circle one): **Married** **Single** **Divorced** **Other** _____

Social Security Number: _____ - _____ - _____

Driver's License/State ID Number: _____ **Issuing State:** _____

Phone Number: _____ **Email address:** _____

Are you the sole owner of this property? **Yes / No.** If no, please provide:

Name of Co-Applicant: _____

Social Security Number: _____ - _____ - _____

Driver's License/State ID Number: _____ **Issuing State:** _____

Phone Number: _____ **Email address:** _____

SECTION 2: HOUSEHOLD, INCOME, AND ASSET INFORMATION

1. Please provide the following information for all people (including yourself) who live at the above address.

| Name | Relationship | Age | Monthly Income |
|-------------|---------------------|------------|-----------------------|
| | | | |
| | | | |
| | | | |
| | | | |

2. Do you currently have a mortgage on this property? **Yes / No.** If yes, please provide:

Current unpaid balance of your mortgage: \$ _____

Monthly payment amount: \$ _____

Name of your mortgage company: _____

3. Do you rent or lease any portion of this property? **Yes / No.**

If yes, what portion? _____% Monthly rent collected: \$ _____

4. Please list all household income, and specify which member of your household supplies the income from each applicable source:

| Type of Income | Amount (monthly) | Source (self, co-applicant, etc.) |
|----------------------------|-------------------------|--|
| Salary/wages | \$ _____ | |
| Social Security | \$ _____ | |
| Pension(s) | \$ _____ | |
| Unemployment | \$ _____ | |
| Disability | \$ _____ | |
| Dividends/ Interest Income | \$ _____ | |
| Workmen's Compensation | \$ _____ | |
| Alimony | \$ _____ | |
| Child Support | \$ _____ | |
| Rental | \$ _____ | |
| Other: | \$ _____ | |

Total Monthly \$ _____

APPLICATIONS WILL NOT BE ACCEPTED WITHOUT COPIES OF YOUR LATEST FEDERAL AND STATE INCOME TAX RETURNS ATTACHED IF ANY,

5. Please list the following **Bank Account** information for all residents at this address:

| Name(s) on Account | Name of Bank/Credit Union | Current Balance |
|---------------------------|----------------------------------|------------------------|
| | | \$ _____ |
| | | \$ _____ |
| | | \$ _____ |
| | | \$ _____ |

9. Do you have any other assets (excluding your homestead and normal household goods) which have not otherwise been disclosed in this form? **Yes / No.**

If yes, please list the assets and their approximate value: _____

SECTION 3: CERTIFICATION

Please be aware, any willfully false statements or misrepresentations in this form may constitute perjury, an offense punishable under Michigan law. By signing this form, I acknowledge that the information on this application, and the documents provided by me in support of this application, are, to the best of my knowledge true and correct statements of fact regarding my property, income, and assets.

I, _____ being the owner and resident of the Oshtemo Township property listed on this form, request tax relief under M.C.L. § 211.7(u) of the Michigan General Property Tax Act (Public Act 390 of 1994), the “Real and personal property of persons who, in the judgement of the Supervisor and Board of Review, by reason of poverty, are unable to contribute toward the public charges, are exempt from taxation under this act.”

DO NOT SIGN THIS FORM UNTIL YOU ARE INSTRUCTED TO DO SO.

Applicant’s Signature

Date: _____

Co-Applicant’s Signature

Date: _____

Applicant(s) presented picture ID, and signed this form in my presence:

Received by: _____

Date: _____

FOR TOWNSHIP USE ONLY

Total Income: \$ _____ **Eligible?** **Yes** **No**

Total Assets: \$ _____ **Eligible?** **Yes** **No**

Eligible Amount:

Taxes (\$_____.____)

Exemption (\$_____.____)

Submitted to Board of Review: _____

Applicant Scheduled to Appear at _____ Board of Review.

Application: ____ **Approved** ____ **Denied**

CHARTER TOWNSHIP OF OSHTEMO
KALAMAZOO COUNTY, MICHIGAN

POVERTY EXEMPTIONS GUIDELINES – 2019

Meeting of the Township Board on December 11, 2018

WHEREAS, the adoption of guidelines for poverty exemptions is within the purview of the Township Board; and

WHEREAS, the homestead of persons who, in the judgment of the Supervisor and Board of Review, by reason of poverty, are unable to contribute to the public charges is eligible for exemption in whole or part from taxation under Public Act 390, 1994 (MCL 211.7u); and

WHEREAS, pursuant to PA 390, 1994 Oshtemo Charter Township, Kalamazoo County adopts the following guidelines for the Supervisor and Board of Review to implement. The guidelines shall include but not be limited to the specific income and asset levels of the claimant and all persons residing in the household, including any property tax credit returns, filed in the current or immediately preceding year;

To be eligible, a person shall do all the following on an annual basis:

- (1) Be an owner of and occupy as a homestead the property for which an exemption is requested.
- (2) File a claim with the Supervisor or Board of Review, accompanied by federal and state income tax returns for all persons residing in the homestead.
- (3) Produce a valid driver's license or other form of identification if requested.
- (4) Produce a deed, land contract, or other evidence of ownership of the property for which an exemption is requested if requested.
- (5) Meet the federal poverty income standards as defined and determined annually by the United States Office of Management and Budget.

- (6) The application for an exemption shall be filed after January 1, but at least a week before the start of the March Board of Review, July Board of Review or December Board of Review.

Poverty exemption standards shall be as follows:

The following are the poverty thresholds as of December 31, 2018, for use in setting poverty exemption guidelines for 2019 assessments:

| Size of Family Unit | 2019 Federal Poverty Guidelines | 2019 Qualifying Income Level Per Township's Policy |
|----------------------------|--|---|
| 1 person | \$12,140 | \$15,175 |
| 2 persons | \$16,460 | \$20,575 |
| 3 persons | \$20,780 | \$25,975 |
| 4 persons | \$25,100 | \$31,375 |
| 5 persons | \$29,420 | \$36,775 |
| 6 persons | \$33,740 | \$42,175 |
| 7 persons | \$38,060 | \$47,575 |
| 8 persons | \$42,385 | \$52,982 |

For each additional person, add \$ 4,320 \$ 5,400

1. Applicants must complete an application, except for their signature, and return it in person to the Assessor's Office.
2. Applications must be signed and witnessed by an employee of the Township and filed with the Assessor after January 1 but at least a week before the start of the March Board of Review, July Board of Review or December Board of Review.
3. Applicant must submit the previous year's Federal Income Tax Return and State Income Tax Return.
4. Applications may be reviewed by the Board without applicant being present, however, the Board may request the applicant be physically present to respond to questions; and may be called upon to appear on short notice.
5. Answers to questions regarding the applicant's financial affairs, health or medical expenses, employment status of those residing in the residence may be requested before the meeting of the Board.
6. Applicants will be administered an oath of truth.

7. An asset test considering all assets owned by the applicant other than the applicant's homestead vehicle and normal household goods will be used in determining whether relief should be granted. Homeowners with assets in excess of \$25,000 may not be eligible for tax exemption consideration.
8. The Board may grant property tax relief based on poverty annually.
9. Applicant may be subject to investigation by the Township to verify information submitted or statements made in regard to a tax exemption claim.
10. The meeting may be recorded, and minutes will be kept of all proceedings of the Board of Review and all meetings held in compliance with the Open Meetings Act.
11. The Board of Review shall follow the policy and guidelines of Oshtemo Charter Township as set forth in this resolution in granting or denying an exemption unless the Board of Review determines there are substantial and compelling reasons why there should be deviation from the policy and guidelines and the substantial and compelling reasons are communicated in writing to the applicant.
12. Applicants will be evaluated based on data submitted to the Board of Review, testimony taken from the applicant and information gathered from any source by the Township.
13. Those homeowners who meet the income and asset limitations set forth herein may be granted an exemption or partial exemption.

A formal motion was made by Elizabeth Heiny-Cogswell, seconded by Zak Ford that the Board of Review follow the above-stated policy and federal guidelines in granting or denying an exemption.

The following voted "Aye":

Elizabeth Heiny-Cogswell, Dusty Farmer, Nancy Culp,
Deborah Everett and Zak Ford

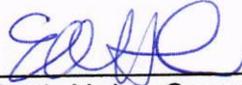
The following was absent: Ken Hudok

The following voted "Nay": None

The following "Abstained": None

There is presently one vacancy on the Board.

The Supervisor declared the Formal Motion had been adopted.



Elizabeth Heiny-Cogswell, Supervisor
Oshtemo Charter Township

CERTIFICATE

I, Dusty Farmer, the duly elected and acting Clerk of the Charter Township of Oshtemo, hereby certify that the foregoing Formal Motion was adopted by the Township Board of said Charter Township at a regular meeting of said Board held on December 11, 2018, at which meeting five members were present, and voted upon the same as indicated in said Minutes; that said meeting was held in accordance with the Open Meetings Act of the State of Michigan.



Dusty Farmer, Township Clerk