

CITY AND COUNTY OF HONOLULU



**REAL PROPERTY TAX CREDIT FOR HOMEOWNERS APPLICATION
TAX YEAR 2023 - 2024**

PARCEL INFORMATION

Tax Map Key _____ Property Address _____

APPLICANT INFORMATION

Last Name _____ First Name _____ Middle Name _____

Mailing Address: Street Number _____ Street Name _____ Unit No. _____

City _____ State _____ Zip Code _____ Phone (Cell Landline) _____ E-Mail Address (Please print clearly) _____

QUALIFICATION REQUIREMENTS

1. Do you have a home exemption on this property for both the 2022 and 2023 tax years?

_____ YES _____ NO (If NO, **STOP**, You do not qualify for the credit)

2. Do any of the owners on title own other property on Oahu, elsewhere in Hawaii, in another state or territory, or in a foreign country?

_____ YES (If YES, **STOP**, You do not qualify for the credit) _____ NO

3. Do you expect the property to be sold or the owners on title to change before June 30, 2023?

_____ YES _____ NO

Any sale of the property or ownership change must be reported within 30 days to the address above or the credit may be voided and a fine may be imposed.

4. Is this property in a trust? YES _____ NO _____

If in a trust, was a separate State or Federal tax return filed for the trust..... YES _____ NO _____
If YES, you must submit copies of the trust's tax return.

- If you are not sure if property is in a trust, please call 768-3205 for assistance.

DOCUMENT REQUIREMENT

If you filed a Federal Tax Return for 2021, submit a Tax Return Transcript (please see page 4 of this application for transcript ordering instructions). As an alternative, if you are unable to obtain a Tax Return Transcript, submit Page 1 and 2 of your 2021 1040 Federal Tax Return.

APPLICATION MAILING INSTRUCTION

MAIL APPLICATION TO:

City and County of Honolulu
Division of Treasury, Tax Relief Section
715 South King Street, Room 505
Honolulu, HI 96813

DEADLINE TO FILE THIS APPLICATION: SEPTEMBER 30, 2022

REAL PROPERTY TAX CREDIT FOR HOMEOWNERS APPLICATION

INCOME OF ALL TITLEHOLDERS											
LIST NAMES AND INCOME OF ALL TITLEHOLDERS											
Last Name	First Name	Middle Name	INCOME From Worksheet (page 3)								
TOTAL COMBINED GROSS INCOME OF ALL OWNERS ON TITLE			\$								
\$60,000 INCOME LIMIT											
<p>Is the "TOTAL COMBINED INCOME OF ALL OWNERS ON TITLE" in Section D above greater than \$60,000?</p> <p>____ YES..... STOP. You do <u>not</u> qualify for the credit.</p> <p>____ NO</p>											
AFFIDAVIT AND CERTIFICATION											
<p>I (we) certify, under the penalty of law, that (1) the statements made in this claim and the accompanying documents are true, correct and complete to the best of my knowledge, (2) I (we) shall continue to qualify for a home exemption under ROH Section 8-10.4 throughout the tax year in which the credit is applied, (3) none of the titleholders owns any other real property anywhere during the applicable tax year and (4) none of the titleholders have violated ROH Section 8-13.5. If I (we) cease to qualify for the tax credit, I (we) must report the change(s) to the Director of Budget and Fiscal Services. I (we) understand that any misstatement of facts will be grounds for disqualification and penalties.</p> <p style="text-align: center; margin: 20px 0;">All owners on title must sign below.</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Signature</td> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Date</td> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Signature</td> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Date</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Signature</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Date</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Signature</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Date</td> </tr> </table>				Signature	Date	Signature	Date	Signature	Date	Signature	Date
Signature	Date	Signature	Date								
Signature	Date	Signature	Date								
CONTACT PERSON											
<p>If we have questions on your application and someone other than yourself should be contacted, please include the information below.</p> <p>This hereby authorizes our office to contact the following person(s) other than yourself, regarding this application for Real Property Tax Credit for Homeowners, Tax Year 2023 - 2024. REQUIRED INFORMATION:</p> <table style="width: 100%; border: none;"> <tr> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Name</td> <td style="width: 50%; border-bottom: 1px solid black; padding-bottom: 5px;">Relationship to Owner</td> </tr> <tr> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Address</td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Phone Number</td> </tr> <tr> <td></td> <td style="border-bottom: 1px solid black; padding-bottom: 5px;">Email Address</td> </tr> </table>				Name	Relationship to Owner	Address	Phone Number		Email Address		
Name	Relationship to Owner										
Address	Phone Number										
	Email Address										
REMINDER: THE DEADLINE TO FILE THIS APPLICATION IS SEPTEMBER 30, 2022. YOU MUST FILE <u>ANNUALLY</u> TO RECEIVE THE TAX CREDIT.											

INCOME AND DOCUMENTS WORKSHEET

All Titleholders must complete this form

Last Name	First	Middle	Soc. Sec. No. (last 4 digits only)	Date of Birth
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Spouse's Last Name	First	Middle	Soc. Sec. No. (last 4 digits only)	Date of Birth
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IF YOU FILED A FEDERAL INCOME TAX RETURN, YOU MUST COMPLETE THIS SECTION

Submit the following required documents with your application:

- 1) Tax Return Transcript, or Page 1 and 2 of your 1040 Federal Return if unable to obtain transcript.
- 2) 1099R with a box 7 code of G or 6 if you rolled-over a portion of IRA or Annuity distribution.
- 3) W2 for 2021 (If you worked in 2021 and received a W2)

We reserve the right to request any other income document to verify your income.

List the gross amount of all income for 2021. If you filed a joint return, you must use the joint income.

Type of Income	\$ Gross Income	Type of Income	\$ Gross Income
Wages (Include amounts deducted from wages for contributions to pension/deferred compensation plans).		Social Security/SSI Benefits	
Interest: Taxable & Tax Exempt		Veterans Disability Benefits	
Dividends		Alimony	
Business Profit/Loss		Rents/Royalties	
Capital Gains/Losses		Debt Write-Off	
Pension & Annuities (Gross Amt. less rollover)		Gambling Winnings	
IRA Distribution (Gross distribution less rollover)		List Other Income:	

Income of all titleholders cannot exceed \$60,000.

TOTAL INCOME \$

IF YOU ARE NOT REQUIRED AND DID NOT FILE A FEDERAL INCOME TAX RETURN, YOU MUST COMPLETE THIS SECTION

You must submit all income documents such as SSA1099, 1099's, W-2, Etc.

If you filed a State of Hawaii Tax Return, you must also submit a copy of the return (N-11).

We reserve the right to request any other income document to verify your income.

List the gross amount of all income you received in 2021.

Type of Income	\$ Gross Income	Type of Income	\$ Gross Income
Wages (Include amounts deducted from wages for contributions to pension/deferred compensation plans)		Social Security/SSI Benefits	
Interest: Taxable & Exempt		Veterans Disability Benefits	
Dividends		Alimony	
Business Profit/Loss		Rents/Royalties	
Capital Gains/losses		Debt Write-Off	
Pension & Annuities (Gross amount less rollover)		Gambling Winnings	
IRA Distribution (Gross distribution less rollover)		List Other Income:	

Income of all titleholders cannot exceed \$60,000.

TOTAL INCOME \$

ALL TITLEHOLDERS MUST SIGN THE STATEMENT BELOW

Revised Ordinance of Honolulu Sec. 8-13.5 (a) (1 & 2)

Any person who files a fraudulent application or attests to any false statement with the intent to defraud the City or evade the payment of real property taxes or any part thereof; or in any manner intentionally deceives or attempts to deceive the City, shall be guilty of a violation and be subject to a criminal fine of not more than \$2,000, in addition to being responsible for paying any outstanding taxes interest and penalties. Please sign and date.

Signature and date

Signature and date

Signature and date

HOW TO OBTAIN AN IRS TRANSCRIPT OF YOUR 2021 TAX RETURN

Transcripts are provided by the IRS at no charge, and mailed to your home.

OPTION 1: REQUEST YOUR TRANSCRIPT BY PHONE (IRS will mail in 5 to 10 days).

Call 1-800-908-9946. You will get a recorded message. When you hear the messages listed below, press the number next to it or enter the information requested. ***Keep this script in front of you as you place your call.***

Step When you hear the message below Press or enter

- | | | |
|---|---|---------------|
| 1 | To continue in English, press 1..... | Press 1 |
| 2 | Please enter the Social Security number for which you are calling..... | Soc. Sec. No. |
| 3 | The Social Sec. No. you entered was ____ if this is correct, press 1 now..... | Press 1 |
| 4 | To verify your address, please enter the numbers of your street address. Do not enter letters or fractions (If your street number has a dash “-“ such as 45-2000, enter only the 45)..... | Street No |

Listen to the recorded information regarding transcript. Wait until you hear Step 5.

- | | | |
|---|---|---------|
| 5 | To receive a transcript of your tax return press 2 | Press 2 |
| 6 | Please enter the year for which you would like information..... | 2021 |
| 7 | The year you entered is 2021, if this is correct press 1..... | Press 1 |

Disregard message about a 10 digit customer file number. Wait to hear step 8.

- | | | |
|---|--|---------|
| 8 | You have requested a transcript of your 2021 tax return, if this is correct press 1..... | Press 1 |
| 9 | To end press 3..... | Press 3 |

OPTION 2: GET A TRANSCRIPT BY MAIL AT: www.irs.gov

You can order your tax return transcript at <http://www.irs.gov> and have it mailed to your address on record.

Select **Get Your Tax Record** option.

Welcome to Get Transcript page will appear. Select **Get Transcript by Mail**.

Complete information requested.

IRS will mail to you in 5 to 10 days. **Note:** IRS will not mail transcript to an address other than the one on your 1040 return.

**If you encounter problems in ordering your IRS Tax Return Transcript,
Please call the Tax Relief Office at (808) 768-3205.**

Before submitting your transcript to the Tax Relief Office,
Please print your full name on the upper right hand corner of the transcript.

DEADLINE TO FILE APPLICATION: SEPTEMBER 30, 2022.

You must file for the tax credit annually to continue receiving the credit.