

COLDWATER TOWNSHIP

RESOLUTION: 3-2021 For: FORM 5737

PROPERTY TAX POVERTY EXEMPTION APPLICATION

(Pursuant to Public Act 390 of 1994) Adopted by the Coldwater Township Board January 9, 2017

AMENDED: 9-16-21

Adjusted to Federal Poverty Standards

2023 for 2024 Assessments

Filing Requirements for HARDSHIP EXEMPTION:

In order to file and qualify for the property tax poverty exemption, the claimant must do **ALL** of the following and meet each of the following requirements annually:

1. Obtain Coldwater Township Applications from the Assessor's Office. (Handicapped or infirmed applicants may call the Assessor's Office to make necessary arrangements for assistance).
2. Applicants will **NOT** be eligible for consideration if they do not meet the Federal Poverty Guidelines set and issued annually.
3. Applicants must OWN and OCCUPY the homestead property for which the exemption is requested.
4. Applicants SHALL fill out the Coldwater Township Application in its entirety and return it in person to the Coldwater Township Assessor, Supervisor or Board of Review at 319 Sprague Rd, Coldwater Michigan 49036 (except for as noted in Item 1 above)
5. Applications must be filed with the Assessor or Supervisor after January 1st but before the day prior to the last day of the Board of Review.
6. Applications may and will be reviewed by the Board without the applicant being present. However, the Board may request that an applicant be physically present to respond to any questions the Board or Assessor may have. This means that you may be called in to appear before the Board on short notice.
7. You may have to answer questions regarding your financial affairs, your health or the status of people living in your home before the Board at a meeting which is open to and may be attended by the public. The Board will be as discrete as possible with your personal data.
8. Applicants appearing before the Board will be administered an oath as follows:

"Do you _____ swear and affirm that the evidence and testimony you will give in your behalf before the Board of Review is the truth, the whole truth and nothing but the truth, sol help you."

Applicant must respond with: "I do" or I will (If capable of doing so)
9. Applicants shall submit last year's copies of the following for all residing in the homestead:
 - a. Federal Income Tax Return – 1040 or 1040A
 - b. State Income Tax Return – MI 1040

10. Applicants must produce a valid driver's license or other form of identification. (The Township may make a copy of your identification and place it on file with your application).
11. Applicants may have to produce a deed, land contract or other evidence of ownership of the property for which an exemption is being requested if required by the Assessor, Supervisor or Board of Review.
12. Any applicant that owns enough land that a portion of it could be sold to pay their taxes shall do so. NOTE: Any sale of A PORTION of your property must comply with State and local zoning laws including filing the Townships' Lands Division Application timely.
13. Meet the federal poverty income standards as defined and determined annually by the United States Office of Management and Budget. (Chart of income standards attached)
14. Report divestment of assets on the required application form.
15. Meet the asset levels test set by the Coldwater Township Board.
16. Meet any other tests that may be set by the Coldwater Township Board.
17. Do not sign your application until it is returned to the Assessor's Office. The applicant's signature must be witnessed by the Assessor or Supervisor in order for the application to be brought before the Board for consideration.
18. The Supervisor and or the Assessor must agree to the Board's decision in regards to the disposition of all individual claims or the decision is null and void.
19. Applicants will be evaluated based on:
 - a. Data submitted to the Board by the petitioner.
 - b. Testimony taken from petitioner.
 - c. Information gathered from any source the Board may wish to use.
20. The Board will also consider all revenue and non-revenue producing assets owned by the petitioner in its deliberation as to whether relief should be granted.\
21. The Board may grant partial or whole exemptions.
22. A successful applicant may be subject to personal investigation by the Township or its agents. This would be done to verify information submitted or statements made to the Assessor or Board of Review in regard to their poverty tax exemption claim.
23. The Assessor or Supervisor may tape record and will keep minutes of all proceedings before the Board of Review and all meetings must be held in the Coldwater Township Hall.

Deliver your application to:

Russell E. Siler, Assessor
Coldwater Township
319 Sprague Rd
Coldwater MI 49036

If you need assistance or have questions, please call (517) 279-9388

FORM 5737

**COLDWATER TOWNSHIP
POVERTY EXEMPTION APPLICATION**

I, _____, Petitioner, being the owner and residing at the property that is listed below as my principal residence, apply for property tax relief under Michigan Compiled Law 211 Section 7u of the General Property Tax Act Public Act 206 of 1893 as revised. The principal residence of persons who, in the judgment of the Township Supervisor, Assessor and Board of Review, by reason of poverty, are unable to contribute toward the public charges, is eligible for exemption in whole or in part from taxation per MCL 211.7u(1).

Property Description of PRINCIPAL RESIDENCE:

Parcel Number: 070- _____ - _____ - _____ - _____ Phone #: _____

Address: _____ Age of Applicant: _____

Age of Dependents: _____

Current Taxable Value of this property: _____

Marital Status: Married Single Separated Divorced Widow Widower

Did you apply for a Homestead Property Tax Credit? Yes No How much was it? _____
(This done thru your State Income Tax form MI 1040)

Real Estate

Is your home paid in full? Yes No If not, what is the unpaid balance? \$ _____

Name of Mortgage Company: _____

Monthly Payments; \$ _____ How many years are left on you Mortgage? _____

Are taxes part of your monthly House Payment? Yes No

How long have you lived at this address? _____

Do you own any other Real Estate? Yes No

If so, List property code numbers, City/Township where the property is located and the Assessor's Name and phone number Below & provide ALL information listed above for each:

Additional Information

FORM 5737

Employer: _____ Name of Contact Person: _____

Address of Employer: _____ Employers' Phone # _____

List all income from salaries, social security, rents, pension, unemployment compensation, disability, government pensions, dividends, workmen's compensation, union claims and lawsuits, alimony, child support or any other source.

| Source of Income: | Monthly Amount: |
|-------------------|-----------------|
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| | |

Bank Accounts and Savings: List all bank accounts owned by you or your spouse and everyone living in or on this property. Also list all savings certificates, postal savings and cash in deposit box(s), cash on hand, or on deposit in credit unions etc.:

| Name of Institution: | Name on Account: | Amount on Deposit: | Date of Deposit: |
|----------------------|------------------|--------------------|------------------|
| | | | |
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| | | | |
| | | | |

List all stocks, bonds, mortgages or land contracts owned by you or your spouse.

| Insured | Face Amount Of Policy | Monthly Payment | Paid Up Policies | Name of Beneficiary | Relationship of Beneficiary |
|---------|-----------------------|-----------------|------------------|---------------------|-----------------------------|
| | | | | | |
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Life Insurance: List ALL policies held by ALL household members:

| Name of Insured: | Amount of Policy | Monthly Payment | Policy Paid in Full ? | Name of Beneficiary | Relationship to Beneficiary |
|------------------|------------------|-----------------|-----------------------|---------------------|-----------------------------|
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Additional Information

FORM 5737

List Motor vehicles in household:

| Make | Year | Monthly Payment | Balance Owed: |
|------|------|-----------------|---------------|
| | | | |
| | | | |
| | | | |

List below all persons living with you:

| Name: | Age | Relationship | Are they Working? If so, List name & address: | How much money do They contribute? |
|-------|-----|--------------|---|------------------------------------|
| | | | | |
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| | | | | |

Personal Debts: What do you owe?

| To Whom: | For What | Date of Debt | Original Amount | Monthly Payment | Balance |
|----------|----------|--------------|-----------------|-----------------|---------|
| | | | | | |
| | | | | | |
| | | | | | |

Monthly Expense Information: The amount of **monthly** expenses **MUST** be listed:

| | | | |
|--------------------|--------------------|--------------------|---------------------------|
| Heating: | Electric: | Water: | House Phone: |
| Cell Phone: | Cable: | Food: | Clothing: |
| Health Insurance: | Garbage: | Daycare: | Car Expense: (gas repair) |
| Other (list type): | Other (list type): | Other (list type): | Other (list type): |
| Other (list type): | Other (list type): | Other (list type): | Other (list type): |

Asset Listing: List all assets owned or controlled by you and their value. For example: Boats, coin collections, art objects, antiques, silver, gold, RV's, etc.

| Type of Asset: | Value : | Owner: |
|----------------|---------|--------|
| | | |
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| | | |

Additional Information:

FORM 5737

Is there any further information you wish to add? _____

NOTICE: Any willful misstatements or misrepresentations made on this application may constitute perjury, which, under the law, is a felony punishable by fine or imprisonment.

NOTICE: Per MCL 211.7u (2b) a copy of **ALL** household members latest Federal Income Tax Returns (1040 or 1040a), State Income Tax Returns (MI 1040) and your Homestead Property Tax Credit claim (MI 1040 CR-1, 2, 3, or 4) must be attached as proof of income. Documentation for all income sources including, but not limited to, credits, claims, Social Security income, child support, alimony income, and all other income sources must be provided at the time of application.

**PETITIONERS: DO NOT SIGN UNTIL WITNESSED BY THE ASSESSOR,
SUPERVISOR OR BOARD OF REVIEW YOU MUST BRING YOUR DRIVERS'
LICENSE OR OTHER LEGAL PROOF OF IDENTIFICATION**

STATE OF MICHIGAN
COUNTY OF BRANCH

I, the undersigned Petitioner, hereby declare that the foregoing information is complete and true and that neither I, nor any household member residing within the principal residency, have money, income or property other than mentioned herein.

Petitioner's Signature

Date

Subscribed and sworn to me this ____ day of _____, 20 ____.

RUSSELL E. SILER, ASSESSOR
Assessing Officer, Board of
Review Member or Notary Public

This application must be returned to the Township after January 1st but before the day prior to the last day of March, July or December Board of Review to be considered.

**COLDWATER TOWNSHIP
FOR BOARD OF REVIEW USE ONLY**

Disposition by Board of Review

Date: _____

Denied

Reduce T.V. to \$ _____

A.V. is: _____

Below are the Signatures of Board of Review Members and the Supervisor or Assessor authenticating the above decision.

Chairman of Board of Review

Supervisor / Assessor
DONALD E. ROGERS / RUSSELL E SILER

Member of Board of Review

Member of Board of Review

DECISIONS OF THE MARCH BOARD OF REVIEW (BOR) MAY BE APPEALED IN WRITING TO THE MICHIGAN TAX TRIBUNAL (MTT) BY JULY 31 OF THE CURRENT YEAR. JULY OR DECEMBER BOR DENIALS MAY BE APPEALED TO THE MTT WITHIN 35 DAYS OF THE DENIAL. A COPY OF THE BOR DECISION MUST BE INCLUDED WITH THE FILING:

Michigan Tax Tribunal, PO Box 30232, Lansing MI 48909
Phone: 517-373-3003 Fax: 517-373-1633E-mail: taxtrib@michigan.gov

**COLDWATER TOWNSHIP
ASSET STANDARDS FOR A
HARDSHIP APPLICATION FOR:
2024**

Asset Eligibility Limitations:

In order to meet the requirements for assets, the total current fair market value of the claimants' household assets cannot exceed \$4,500.00. This means that a claimant may have up to this amount before the cash equivalent is considered available for paying your share of the public charges (property taxes).

Definition of Assets:

Assets include, but are not limited to the cash value of savings accounts and shares, certificates of deposit, investments such as stocks, bonds, mutual funds, deferred compensations accounts, equity in real estate other than the homestead for which the exemption is claimed, motor vehicles, other than one primary transportation vehicle, jewelry, coins and other collectibles, precious metals, and other similar possessions which are not essential to the subsistence or health and well-being of the claimant. Gifts, lump-sum inheritances, dividends, interest, rental proceeds, royalties, and other receipts received in the form of a gift, or as a result of asset divestment, shall be considered as asset if received on a one-time lump-sum basis and shall be included in the determination of asset eligibility.

Divestment:

Divestment means a transfer of a resource. Transfer of a resource means giving up all or partial ownership in (or rights to) a resource. Examples include, but not limited to: selling an asset, giving an asset away, refusing an inheritance, giving up the rights to receive income, and other similar divestment actions.

If an application for property tax exemption has divested any assets during the period of 36 months preceding the date of the application, then such divestment shall be considered in the determination of eligibility.

ADDITIONAL STANDARDS

Partial Poverty Exemption:

Act No. 390 of Public Acts of 1994 authorizes the March Board of Review's decision on a poverty exemption claim to Michigan Tax Tribunal by July 31. An appeal of a July or December board of review poverty exemption decision may be made to the Michigan Tax Tribunal within 30 days of the decision. Appeals are to be made in Writing to: MICHIGAN TAX TRIBUNAL, P.O. BOX 30232, LANSING MI 48909.