Assessing Department
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Claremont, New Hampshire 03743
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DISABLED EXEMPTION

(RSA 72:37-B) : <DIS>

Filing Period: Starts in January (once you have all your year-end statements and forms from your sources of income and financial institutions). **The filing deadline is April 15th.**

QUALIFICATIONS:

- Applicant is eligible under Title II or Title XVI of the Federal Social Security Act for benefits to the disabled
- Applicant has resided in **New Hampshire for 5 years**
- Applicant must own real estate individually, or jointly on April 1st ; If Applicant's spouse owns the real estate, they must have been married for at least five consecutive years on or before April 1st
- Applicant must reside at the real estate where exemption is claimed as his/her principle place of abode
- **Yearly Gross Income Limitations: Single: $19,600, Married: $26,600** (excluding business expenses/costs, life insurance proceeds on the death of an insured, or proceeds from the sale of assets)
- **Asset Limitation: $35,000** excluding residence and the value of a minimum single family residential lot or 2 acres, whichever is greater

Must apply with:

1. Disabled Exemption Worksheet
2. Documentation of all income & assets (**See list of Required Documentation on back**)
3. Permanent Application form PA-29
4. A Letter from Social Security Administration, indicating Title II or Title XVI benefits
5. If property is held in a Trust you must include the following:
    - Statement of Qualification form PA-33 with copy of the Trust

BENEFITS:

$19,250 reduction of assessed value

Required Documentation for Income Verification
For both Applicant & Spouse

- Complete copy of Federal Income Tax Forms including all attached schedules for past calendar year (applicant and spouse), if filed
- Complete copy of State of New Hampshire Interest and Dividend Tax form for the past calendar year (applicant and spouse), if filed
- Form SSA 1099 (Social Security Benefit Statement for the past calendar year)
- Form 1099 R (Distribution from Pensions, Annuities, Retirement or Profit Sharing Plans, IRA's, insurance contracts, etc for past calendar year, if applicable
- Form W-2 (All Wage Statements for the past calendar year)
- Form 1099 INT (Interest Statements for past calendar year)
- Form 1099 DIV (Dividend Distributions from Stocks, Bonds, Mutual Funds, etc) for the past calendar year
- Documentation showing moneys received in the past calendar year from Veteran Benefits, Business Income, Rental Income, Unemployment Compensation, Alimony, Child/Dependant Support, Fuel or Electric assistance or any other moneys received that are not listed here

A copy of your SSA-1099 form can be obtained from the Social Security Administration by calling: 1-800-772-1213

Required Documentation for Asset Verification
For both Applicant & Spouse

- Checking and Savings statements (complete statements/all pages/from all banks) for the **last 3 months** of the previous year (Oct., Nov., Dec.)
- Documentation showing the cash value of all annuities, whole life insurance policies, IRAs, 401K, mutual funds, investment stocks, bonds, CD's
- Evidence/documentation/mileage showing the value of all cars, trucks, motorcycles, boats, camping trailer and other type of recreational vehicles you own
- Documentation showing the balance of any loans on the vehicles you own
- Documentation showing the current value of all real estate your own, excluding your primary residence with two acres of land
- Documentation showing the balance of any mortgages, liens or loans on all real estate you own, excluding your primary residence with two acres of land
- Documentation of the value and current loan balances on any assets not previously mentioned
- Copy of the Trust if property is owned by a trust, or a copy of the Declaration of Trust, including a list of beneficiaries or a completed Certification of Trust per RSA 564-B: 10-1013.
- Copy of the Deed showing the assigned ownership, if in a Life Estate.

All Information submitted shall be considered **CONFIDENTIAL** and not part of the public records.