

DISABLED VETERANS' REAL ESTATE TAX EXEMPTION PROGRAM APPLICATION FOR EXEMPTION FROM REAL PROPERTY TAXES

Every blank must have an entry or the application will be returned. No determination can be made until all required information is provided.

Important Facts to Remember when Applying:
Type or Print clearly all requested information
The affidavit at the end of the application must be processed through your local County Director
for Veterans' Affairs New Applications must be Date Stamped by your County Tax Assessor's Office
Documents Required:
VA Form 3288 - With highlighted areas only filled out and signed - SEE ATTACHED
Copy of Property Deed
Military Discharge (DD-214) showing character of discharge and dates of service
Marriage Certificate (Surviving Spouse application only)
Veteran's Death Certificate (Surviving Spouse application only)
Income Verification Documentation Required (if Applicable):
1040 Federal Income Tax Return (<u>If you are required to file</u>)
1040 Schedules: C (Business); D (Capital Gains); E (Rental Income); F (Farm Income)
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Employment Income (most recent W-2)
Social Security Benefit Statement (Form SSA-1099)
Interest Income (Form 1099-INT)
Dividend Income (Form 1099-DIV)
Distribution from Pensions, Annuities, Retirement or Profit Sharing Plans, IRA's, Insurance Contracts, etc. Form 1099-R; 1099-MISC; 1099-C (Cancellation of Debt); W-2G (Gambling Earnings)
Expense Documentation Required

** If the Claimant's income is greater than \$108,046 **

** Authority: 51 Pa.C.S. Chapter 89. **

Privacy Act Statement.

<u>Principal Purpose</u>: This application form is the primary source of information to determine eligibility for the Real Property Tax Exemption Program for certain disabled veterans and their unmarried surviving spouses.

Routine Use: The information you provide will be used to review and determine your eligibility for exemption for real property taxes under Article 8, Section 2(c) of the Pennsylvania Constitution, 51 Pa.C.S. Ch. 89 and 43 Pa. Code Ch. 5 Sub-Chapter C. The information may be provided to federal, state, and local agencies, including your local taxing authorities, in connection with review of your application.

<u>Voluntary Disclosure</u>: Responding to this collection of information is voluntary. However, if the information is not furnished, we may not be able to comply with your request.

MA-VA Form 40 January 2023 (All previous editions are obsolete.)