



**INSTRUCTIONS FOR  
APPLICATION  
ONE-YEAR HARDSHIP EXEMPTION  
MONTCALM COUNTY TREASURER**



The Application for One-Year Hardship Exemption has been designed to be in keeping with the requirements of the State of Michigan with regard to poverty exemptions. To be considered for a hardship exemption, the following information must be provided:

1. COMPLETE ALL SECTIONS OF THIS APPLICATION IN FULL; BE SURE TO SIGN THE APPLICATION.
2. Submit a completed and signed copy of the following:  
  
Most recent Michigan Income Tax Return, including Homestead Property Tax Credit Claim (MI 1040 CR)  
  
Most recent Federal Income Tax Return (1040), if you are required to file federal income tax.  
  
Most recent Federal Income Tax Return (1040) for all other occupants of your home.
3. If an occupant of your home is not employed but has income from another source, you must show the income in "Annual Income" on page 1 of your application. It must also be on page 3 under the "Estimated Household Income" section and included in Total Projected Household Income for this year.
4. If you completed the section page 1 of the application indicating you have major or unusual out-of-pocket expenses, you must provide copies of documents verifying these expenses. This does not include everyday living expenses.
5. The application must be legible. If you need or want to provide additional information, please attach a separate sheet. If you need help preparing your application, please call us.
6. Do not submit originals of supporting documentation as we must keep these for our records and cannot return them.
7. If the application is incomplete or you do not include copies of the required financial documents, you may be considered ineligible for a one-year hardship exemption.

# APPLICATION

PARCEL I.D. \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

## APPLICATION FOR ONE-YEAR HARDSHIP EXEMPTION (*CONFIDENTIAL INFORMATION*) MONTCALM COUNTY TREASURER'S OFFICE

APPLICANT'S NAME \_\_\_\_\_ AGE \_\_\_\_\_

NAME OF SPOUSE or CO-OWNER (if applicable) \_\_\_\_\_ AGE \_\_\_\_\_

APPLICANT'S MAILING ADDRESS \_\_\_\_\_

PROPERTY ADDRESS FOR WHICH RELIEF IS BEING SOUGHT \_\_\_\_\_  
\_\_\_\_\_

DO YOU CLAIM THIS PROPERTY AS YOUR HOMESTEAD (Principal Residence)? ( ) YES ( ) NO

TELEPHONE NUMBER \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_ or CELL PHONE # \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

ARE YOU A MILITARY VETERAN? ( ) YES ( ) NO IS YOUR SPOUSE A MILITARY VETERAN? ( ) YES ( ) NO

**EMPLOYMENT STATUS AND NAME OF EMPLOYER:**

	EMPLOYED	EMPLOYER
SELF	( ) YES ( ) NO	( ) FULL TIME ( ) PART TIME
SPOUSE	( ) YES ( ) NO	( ) FULL TIME ( ) PART TIME

**ARE YOU DISABLED?**

SELF	( ) YES ( ) NO
SPOUSE	( ) YES ( ) NO

NATURE OF DISABILITY \_\_\_\_\_

Please provide documentation of disability.

Do you have any MAJOR OR UNUSUAL OUT-OF-POCKET expenses? If yes, please list them below and provide verification.

TYPE OF EXPENSE	AMOUNT PER YEAR

**LIST ALL PERSONS LIVING IN THIS HOME OTHER THAN YOU OR YOUR SPOUSE:**

	1	2	3	4
Name				
Age				
Relationship				
Occupation				
Annual Income				
Claimed as Dependent	( ) Yes ( ) No	( ) Yes ( ) No	( ) Yes ( ) No	( ) Yes ( ) No

Attach additional sheet, if needed.

**PROPERTY INFORMATION**

Purchase Date: \_\_\_\_\_ Purchase Price: \_\_\_\_\_ (if purchased in last 3 years)

If not, amount of monthly payment: \_\_\_\_\_ Have any improvements, changes, or additions been made to the property in the last two (2) years? ( ) Yes ( ) No  
 Do you own this property free and clear? ( ) Yes ( ) No If yes, please explain:

Are the taxes included in payment? ( ) Yes ( ) No \_\_\_\_\_  
 \_\_\_\_\_

**ASSET INFORMATION**

Do you have an ownership interest in any other real estate (including ownership via partnerships, corporation, etc.) in Michigan or anywhere else? ( ) Yes ( ) No If yes, please list (attach additional sheet if needed).

<u>Location</u>	<u>Value</u>	<u>Type of Use</u>	<u>Purchase Date</u>	<u>Purchase Price</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

What are your assets in addition to real estate? (Do not include sheltered retirement plans such as IRA, 401(K), 403(B), Keogh, 457, annuities, or company pension programs)

Cash	\$	_____
Savings Accounts/Certificates & Money Markets	\$	_____
Checking Accounts	\$	_____
Stocks/Bonds/Treasury Bills	\$	_____
Insurance - Cash Value	\$	_____
Other	\$	_____
Investments	\$	_____
Personal Property held as an investment (i.e., gems, jewelry, coin collections, antique cars, etc.)	\$	_____

Vehicles: Cars, Trucks, Boats, Trailers, etc.

Make	#1	#2	#3
Model			
Year			
Value	\$	\$	\$
Balance Owed	\$	\$	\$

**LIABILITY INFORMATION**

What are your liabilities?

Monthly Payment

Total Owed

Mortgage	\$	\$
Land Contract	\$	\$
Credit Cards	\$	\$
Automobile	\$	\$
Automobile	\$	\$
Automobile Insurance	\$	\$
House Insurance	\$	\$
Property Taxes	\$	\$
Electricity	\$	\$
Heat (Propane, Gas, Fuel Oil)	\$	\$
Phone (Cell and/or Land Line)	\$	\$
Internet	\$	\$
Cable TV or Satellite	\$	\$
Groceries	\$	\$
Other Payments (ie: boat, rv, schooling, medical)	\$	\$

Please explain any other expenses not covered above:

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**INCOME INFORMATION**

*ESTIMATED HOUSEHOLD INCOME FOR THIS YEAR*

SOURCE	AMOUNT PER YEAR
Wages, Salaries, Tips, Sick, Strike, and sub-pay, etc.	\$
Social Security/SSI Benefits Income	\$
Retirement Pension or Annuity Benefits (Includes Military Retirement Pay)	\$
Interest and/or Dividends Earned (includes non-taxable interest)	\$
Rent/Business or Royalty Income	\$
Disability Payments (Worker Comp, Veterans Disability, Pension Benefits)	\$
ADC, SFA, SDA, RAP/REP (Attach a copy of DSS Annual Statement)	\$
Alimony	\$
Child Support	\$
Unemployment Benefits	\$
Other Nontaxable Income (Military Family Allotments, College Scholarships, Grants, Fellowships, Etc.)	\$
Less Amount <b>YOU PAY</b> for Medical Insurance	\$ (                    )
<b>YOUR TOTAL INCOME</b>	<b>\$</b>
ADD INCOME FOR ALL MEMBERS OF HOUSEHOLD (not claimed as dependents) AS SHOWN ON FIRST PAGE OF APPLICATION	\$
<b>TOTAL PROJECTED HOUSEHOLD INCOME FOR THIS YEAR</b>	<b>\$</b>

Please use a separate piece of paper to (1) describe any special circumstances which make it hard to pay your delinquent taxes and (2) explain how you plan to catch up (for example, monthly payments of a certain amount, sale of the property, sale of other assets, etc.).

**BUDGET COUNSELING**

We encourage all taxpayers requesting a hardship extension to attend individual or family debt/budget counseling. We work with the MSU Extension Office who provides expert help at no cost to the individual. They will help you develop a payment strategy to address your delinquent taxes, credit card debt, mortgage payments, and other debt or credit problems. Their services are confidential and we do not receive a copy of any of the information that you might provide to them or any advice that they might provide to you, unless you decide to sign a release of information.

Please ask us for a referral.

**I DECLARE UNDER THE PENALTIES OF PERJURY, THAT ALL OF THE INFORMATION SUBMITTED IN MY APPLICATION FOR HARDSHIP EXEMPTION IS TRUE.**

**YOUR SIGNATURE:** \_\_\_\_\_

**SPOUSE OR CO-OWNER'S SIGNATURE:** \_\_\_\_\_

**DATE:** \_\_\_\_\_