

**OTC
996**

Revised 1-2010

CURRENT YEAR

**REQUEST FOR INCOME VERIFICATION
FOR VALUATION FREEZE/ADDITIONAL
HOMESTEAD**

INSTRUCTIONS ON REVERSE SIDE
PLEASE READ CAREFULLY

Applicant's
Social Security
Number

-

Co-Applicant's
Social Security
Number

-

PART I.

COUNTY REQUESTING VERIFICATION

County:

Date:

Assessor Address:

City:

Zip Code:

Fax Number:

Telephone Number:

REQUEST FOR INCOME VERIFICATION FOR THE TAXABLE YEAR _____.

PART II.

APPLICATION INFORMATION

First Name and Initial (if joint application, give first names and initials of both)

Last Name

First Name and Initial of Co-applicant (if joint application, give first names and initials of both)

Last Name

Present Home Address:

City, Town or Post Office, State:

Zip Code

Telephone Number

Assessor's Account Number

Did Applicant File Oklahoma Income Tax for Previous Year _____: Yes No Unknown

IF NO STOP HERE: INCOME WILL NOT BE VERIFIABLE

Remarks: _____

Assessor

Date

SIGNED COPY OF OTC FORM 994 MUST BE ATTACHED

PART III.

OKLAHOMA TAX COMMISSION USE ONLY

Individual income tax records are based on Oklahoma gross adjusted income and **may not** indicate actual household income.

1. Income Not Verifiable

2. Eligible Income for Freeze less than or equal to \$ _____ H.U.D. Requirement.....
(County Assessor must indicate the H.U.D. Qualification income)

3. Eligible Income for Additional Homestead Exemption.....
(\$20,000 below gross household income)

**QUALIFICATION
YES NO**

1.

2.

3.

Individual records cannot be released under Oklahoma's confidentiality statute. 68 Okl.St. Ann., Section 205.

Remarks: _____

OTC

Taxpayer Assistance Division

Date

INSTRUCTIONS

ELIGIBILITY REQUIREMENTS

- (1) Head-of household must be age 65 as of January 1st of current year when filing for property valuation freeze.
- (2) Head-of household must be an owner of and occupy the homestead property on January 1.
- (3) Gross household income (collective income of all persons living in the homestead residence) must not exceed median family county as described by the U.S. Department of Housing and Urban Development each year for the preceding calendar year for the valuation freeze and \$20,000 for additional homestead exemption. For freeze income qualification in your county, contact the county assessor. Ref. 68 O.S. Section 2802.1; 2890; 2890.1. Qualification income for Additional Homestead Exemption is \$20,000.

PART I. COUNTY INFORMATION (TO BE COMPLETED BY COUNTY ASSESSOR)

Enter Applicant(s) Social Security number(s).

Enter county name, address, telephone number and the current date. Complete taxable year for income verification for previous year.

Income will not be verifiable without Social Security number(s)

PART II. TAXPAYER INFORMATION (TO BE COMPLETED BY COUNTY ASSESSOR)

Enter in name, address, physical location, telephone number, assessor's account number and filing status on taxpayer(s).

Eligibility based on previous year Oklahoma gross adjusted income.

Assessor requesting verification is to sign application.

Attach a copy of the signed Oklahoma Tax Commission Form 994 application.

Additional verification forms may be submitted if the number of residents in the household is more than two persons whose income will be included in the gross household total.

PART III. TAXPAYER INFORMATION (TO BE COMPLETED BY TAX COMMISSION)

Note: Assessor must indicate the H.U.D. Qualification income.

If no Oklahoma income tax return was filed for the previous year, do not submit this form to the Oklahoma Tax Commission. Income is not verifiable.

MAIL TO:
OKLAHOMA TAX COMMISSION
TAXPAYER ASSISTANCE
POST OFFICE BOX 269057
OKLAHOMA CITY, OK 73126-9057