



Albany County Property Tax Refund Program
Affidavit and Application for Property Taxes Billed in 2022
Filing Deadline: Monday, September 4, 2023

Please print or type all information provided on this application.

Applicant's First Name _____ M.I. _____ Last Name: _____

Social Security Number _____ Telephone Number _____

Property Address _____ Parcel Number _____

Mailing address, if different from above _____

City/Town _____, Wyoming Zip Code _____

WYOMING RESIDENCY REQUIREMENT

The law requires the applicant taxpayer to have been a Wyoming resident for a period of at least five (5) years immediately preceding the year in which he/she applies for a property tax refund under this program and occupied the principal residence applying for the refund for at least nine (9) months of the year being applied for. A resident is a person who physically lives in Wyoming for more than one-half (1/2) of the year; however, a person does not lose his/her residency if their absence is for business of the state or federal government, including military service.

Have you been a resident of Wyoming for the past five (5) years, according to the definition above? Yes *Circle One* No

Have you occupied the residence as your principal residence for at least nine (9) months of the year applied for? Yes *Circle One* No

Note: If you circled "No" to either question, do not complete the remainder of this form, you do not qualify.

PROPERTY TAX PAID ON APPLICANT'S PRIMARY RESIDENCE

What was the amount of the property tax bill issued in September 2022: \$ _____

If any portion of this residence was used for business purposed during the year, enter the amount of the property tax that was claimed as business expense here: \$ _____

REQUIRED ATTACHMENTS FOR THIS SECTION:

- 1. A copy of your property tax bill issued September 2022
- 2. A copy of your property tax payment receipts issued by the county treasurer between September 2022 and June 2023.

ANNUAL INCOME REPORT: LIST ALL TAXABLE AND NONTAXABLE INCOME

Complete the income information for all adult members of the household in the space provided on the following page. Be sure to complete a column for each adult member of the household, even if they are not required to file an income tax return with the Internal Revenue Service. If any adult member of the household who had income did not file a federal income tax return, initial the space provided to declare that person's exemption from filing such a return.

REQUIRED ATTACHMENTS FOR THIS SECTION:

A copy of IRS Form 1040, 1040SR, or any other valid IRS reporting form for every adult member of the household who filed such a return. If any adult member of the household is not required to file a federal income tax return, attach copies of all statements they received regarding Social Security, Retirement, and all other income.

Adult Household Member	Taxpayer	Additional Person	Additional Person	Additional Person	Additional Person
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Last Name					
First Name					
Household member initial here IF no income tax return filed					

Income

Total Income ⁽¹⁾					
Form 1040 line 9 or Form 1040 SR line 9					
Non-Taxable Income ⁽¹⁾					
Non-Taxable Interest					
Non-taxable portion of IRA and other pension distributions ⁽¹⁾					
Non-taxable portion of Social Security benefits ^{(1) (2)}					
Other					
Total for Each Household Member					

GRAND TOTAL FOR ALL MEMBERS OF THE HOUSEHOLD

(1) See instructions page ANNUAL INCOME REPORTS Section #2
 (2) Before Medicare / Medicaid Insurance Fees

Attach additional sheets IF necessary

VALUE OF HOUSEHOLD ASSETS

The law states a taxpayer does NOT qualify for this property tax refund program if the value of certain kinds of assets exceeds **\$150,000 per adult member of the household**. Here are the assets that count toward this limitation:

1. Bank accounts;
2. Investments (stocks, bonds, mutual funds, certificates of deposit, etc.);
3. Real estate other than the house subject to this application; and,
4. Motor vehicles in excess of one allowed for each adult member of the household.

Is the value of the assets listed above owned by each adult member of the household **LESS THAN \$150,000** or does your total tax bill exceed 10% of your total reported household income?

Circle One: Yes No

Note: If you circled "No", do not complete the remainder of the form, you do not qualify.

CERTIFICATION

I certify under penalty of perjury that:

1. The social security number shown on this form is my correct taxpayer identification number (or I am waiting for a number to be issued to me); and
2. * I am not subject to backup withholding because (a) I am exempt from backup withholding, or (b) I have not been notified by the IRS that I am subject to backup withholding as a result of failure to report all interest and dividends, or (c) the IRS has notified me that I am no longer subject to backup withholding, and
3. I am a U.S. person (including a U.S. resident alien), and
4. The information entered on this application is true, correct, and complete to the best of my knowledge and belief.

Signature

Date Signed

** You must cross out item number "2" above if you have been notified by the IRS that you are currently subject to backup withholding because you have failed to report all interest and dividends on your tax return*

WHERE TO FILE

**Albany County Treasurer
525 Grand Avenue, Room 205
Laramie, WY 82070
Phone: (307) 721-2502
Fax: (307) 721-2503**

DOCUMENT RETENTION NOTICE

Neither this application nor any of the documents attached to it will be returned to the applicant. Therefore, the applicant should make and retain copies of all documents for his/her records.

PRIVACY ACT NOTIFICATION

Requesting Agency: Albany County Treasurer

Why This Notification Is Provided: This notification is required by the Privacy Act of 1974 (P.L. 93-597).

Authority for Collection of Information: Albany County Wyoming is required to file an information return with the Internal Revenue Service, so a correct Social Security Number (SSN) is required on this application, per Internal Revenue Code Section 6109. IRS regulations provide the following: If you fail to furnish your correct SSN to a requestor, you may be subject to a penalty of \$50 for each such failure unless your failure is due to reasonable cause and not to willful neglect. If you make a false statement with no reasonable basis that results in no backup withholding, you may be subject to a \$500 penalty. If you willfully falsify certifications or affirmations, you may be subject to criminal penalties including fines and/or imprisonment.

Purpose: The principal purpose for collecting information on this form, including the SSN, is to obtain the information necessary to determine whether a person is eligible for property tax refund under W.S. 39-13-109(c)(vi), and if so, to provide the Albany County Clerk's Office with the information they require to approve the refund of payment.

Uses: Disclosure of identifiable information, including your SSN, shall be made to the Albany County Clerk's Office to comply with Internal Revenue Service regulations, as stated above. This information may also be disclosed to other agencies in the event of litigation involving refund granted or denied under this program.

ALBANY COUNTY WYOMING PROPERTY TAX REFUND PROGRAM FILING INSTRUCTIONS

The application for the property tax refund must be properly completed and filed with the Albany County Treasurer **no later than the first Monday in September; for 2022 taxes that date is September 4, 2023.**

Be sure to fill in all applicable spaces on the entire form. If a particular item is not applicable, be sure to mark it as such; do not leave items blank. Please attach all supporting documents for income. **INCOMPLETE FORMS WILL RESULT IN THE DENIAL OF REFUND UNDER THIS PROGRAM.**

WYOMING RESIDENCY REQUIREMENT

1. If you qualify under the terms of the residency requirement set forth in the Wyoming Residency Requirements, circle "Yes"; otherwise, circle "No".

PROPERTY TAX PAID ON APPLICANT'S PRIMARY RESIDENCE

1. The house subject to the application must be the applicant's principal residence and occupied by the owner not less than 9 months of the applicable tax year.
2. In the space provided enter the total amount of the property tax bill for the subject property, as reflected on the bill you received last September. Attach a copy of the bill to this application form.
3. If any part of the residence is used for business purposes and you prepare a Schedule 1 – Business Income Statement or a – Farm Income Statement for your income tax return, enter the amount of property tax you deducted on Schedule C or Schedule E in the space provided.

ANNUAL INCOME REPORT

1. Complete the income section, listing total income for all adult members of the household in the spaces provided on the application form. Be sure to enter the grand total for all members' incomes combined in the space provided. If there are more than five adult members of the household, attach additional sheets.
2. Specific instructions for items marked (1) on the Income section of the application:
 - a. Total Income: For each adult household member, report the amount from the indicated line of their federal income tax return. Use the appropriate line for each member.
 - b. Nontaxable Interest: Enter the amount from line 2a of the Form 1040 or 1040-SR of each applicable household member and enter on the line provided.
 - c. Nontaxable portion of IRA or other pension distributions: Subtract the amounts on lines 4b from the corresponding amounts on lines 4a of the Form 1040 or 1040-SR and or subtract the amounts on 5a from amounts on 5b and enter the results on the line provided.
 - d. Nontaxable portion of Social Security benefits: Subtract the amount on line 6b from the corresponding amount on line 6a of the Form 1040 and or 1040-SR and enter the result on the line provided.

VALUE OF HOUSEHOLD ASSETS

1. If the value of the assets listed, owned by each adult member of the household is **LESS THAN \$150,000 or in any case that your property tax bill exceeds 10% of your total household income reported then** circle "Yes"; otherwise, circle "No".

CERTIFICATION

1. Be sure to read the certification statement very carefully, and sign and date the application in the space provided.

IMPORTANT DOCUMENTATION REQUIRED

1. Attach copies of:
 - a. The federal income tax returns for all adult members of the household
 - b. Schedule 1 of the federal income tax returns, if applicable (See item 3 under "Property Tax Paid on Applicant's Primary Residence section above)
 - c. The property tax bill on the subject property
 - d. Property tax payment receipts on the subject property
 - e. A copy of the year-end statement of social security, pension and all other income received for any adult member of the household who was not required to file a federal income tax return for the applicable property tax year.

CALL THE ALBANY COUNTY TREASURER'S OFFICE FOR ASSISTANCE (307) 721-2502