

EXHIBIT B:**UPPER MERION AREA SCHOOL DISTRICT**
PROPERTY TAX REBATE**UMASD Tax Year July 1, 2023, TO June 30, 2024, for year 2022 PA-1000 (filed in 2023)****FILING INSTRUCTIONS****WHERE TO FILE:** UMASD Administrative Offices, 435 Crossfield Rd, King of Prussia, PA 19406**WHEN TO FILE:** After July 1, 2023 but before June 30, 2024*** PLEASE COMPLETE ALL REQUESTED INFORMATION * Please print legibly or type****PART A** – Personal Information

Name of Claimant:

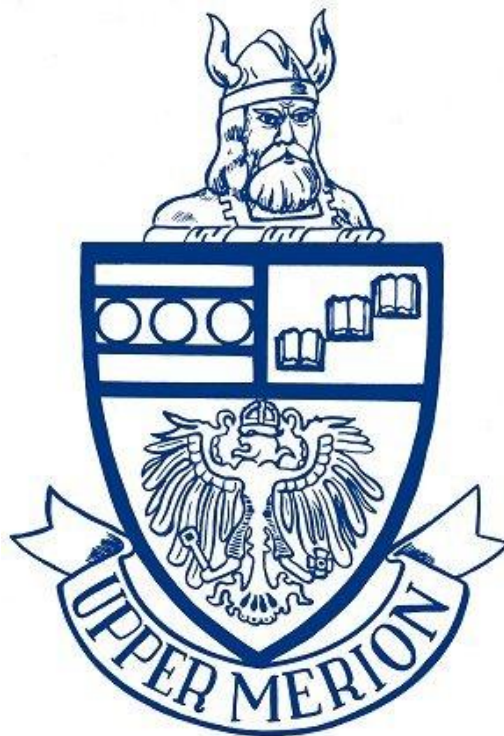
Address of Claimant:

Phone Number:

Parcel Number (Found on Tax Bill):

Birth date of Claimant:

Social Security Number of Claimant:



| | | |
|---|---|---------|
| PART B – Form PA-1000 2022 (Property Tax or Rent Rebate Claim) | | |
| Insert amount from Line 13 on Form PA-1000 2022 (Total Income) | | \$ |
| <i>Inserted amount in above PART B may not exceed \$35,000 for owners or \$15,000 for renters</i> | | |
| Complete Applicable Section C | | |
| PART C (1) – FOR PROPERTY OWNERS with INCOME in PART B <u>BELOW</u> \$30,000 ONLY. | | |
| Eligible for Supplement | | |
| Calculation of Property Tax Rebate from UMASD | | |
| (a) Insert total property taxes paid from Line 14 on Form PA-1000 2022 | | \$ |
| (b) Insert Property Tax Rebate amount from Line 15 on Form PA-1000 2022 | | \$ |
| (c) Divide total property taxes paid from Line (a) by total income in Part B. | | _____ % |
| (d) If Line (c) is less than 15%, enter the amount from line (b); If Line (c) is greater than 15% multiply line (b) by 1.5 | | |
| (e) Subtract line (d) from line (a) | = | \$ |
| (f) Percentage Rebate Factor | | x 35% |
| (g) Multiply line (d) by line (f) | = | \$ |
| (h) Property Tax Rebate from the School District (insert the lessor of line (e) and line (g)) | | |
| <i>Inserted amount on line (h) above may not exceed \$341.25</i> | | |
| PART C (2) – FOR PROPERTY OWNERS with INCOME in PART B <u>ABOVE</u> \$30,000 ONLY. | | |
| Calculation of Property Tax Rebate from UMASD | | |
| (a) Insert total property taxes paid from Line 14 on Form PA-1000 2022 | | \$ |
| (b) Insert Property Tax Rebate amount from Line 15 on Form PA-1000 2022 | | \$ |
| (c) Subtract line (b) from line (a) | = | \$ |
| (d) Percentage Rebate Factor | | x 35% |
| (e) Multiply line (b) by line (d) | = | \$ |
| (f) Property Tax Rebate from the School District (insert the lessor of line (c) and line (e)) | | |
| <i>Inserted amount on line (f) above may not exceed \$227.50</i> | | |
| PART C (3) – FOR RENTERS ONLY - Calculation of Rent Rebate from UMASD. | | |
| (a) Insert amount from Line 17 on Form PA-1000 2022 | | \$ |
| (b) Insert amount from Line 18 on Form PA-1000 2022 (Rent Rebate) | | \$ |
| (c) Subtract line (b) from line (a) | = | \$ |
| (d) Percentage Rebate Factor | | x 35% |
| (e) Multiply line (b) by line (d) | = | |
| (f) Rent Tax Rebate from the School District (insert the lessor of line (c) and line (e)) | | |
| <i>Inserted amount on line (f) above may not exceed \$227.50</i> | | |
| PART C (4) – COMBINED OWNER/ RENTERS with INCOME in PART B <u>BELOW</u> \$30,000 ONLY. | | |
| Eligible for Supplement | | |
| Calculation of Property Tax Rebate from UMASD | | |
| (a) Insert total property taxes paid from Line 17 on Form PA-1000 2022 | | \$ |
| (b) Insert Property Tax Rebate amount from Line 19 on Form PA-1000 2022 | | \$ |
| (c) Divide total property taxes paid from Line (a) by total income in Part B. | | _____ % |
| (d) If Line (c) is less than 15%, enter the amount from line (b); If Line (c) is greater than 15% multiply line (b) by 1.5 | | |
| (e) Subtract line (d) from line (a) | = | \$ |
| (f) Percentage Rebate Factor | | x 35% |
| (g) Multiply line (d) by line (f) | = | \$ |
| (h) Property Tax Rebate from the School District (insert the lessor of line (e) and line (g)) | | |
| <i>Inserted amount on line (h) above may not exceed \$341.25</i> | | |
| PART C (5) – COMBINED OWNER/RENTERS with INCOME in PART B <u>ABOVE</u> \$30,000 ONLY. | | |
| Calculation of Tax/Rent Rebate from UMASD | | |
| (a) Insert amount from Line 17 on Form PA-1000 2022 | | \$ |
| (b) Insert Property Tax Rebate amount from Line 19 on Form PA-1000 2022 | | |
| (c) Subtract line (b) from line (a) | = | |
| (d) Percentage Rebate Factor | | x 35% |
| (e) Multiply line (b) by line (d) | = | |
| (f) Rent Tax Rebate from the School District (insert the lessor of line (c) and line (e)) | | |
| <i>Inserted amount on line (f) above may not exceed \$227.50</i> | | |

PART D – Checklist of Required Information to send with Rebate Request FormRequires Part (a) **AND** Part (b)

- (a) ☐ Copy of Form **PA-1000 2022** (Page 1 & 2 of Property Tax or Rent Rebate Claim) filed with the PA Dept. of Revenue
- (b) ☐ Copy of **2022 PA-1000 Rebate Check Received in 2023** or
Statement of Direct Deposit from the State Received in 2023
noting rebate as shown in:
Part C (1) & C (4) line (d); or
Part C (2), C (3) & C (5) line (b)

I declare that this form is true, correct and complete, that the documents required and attached hereto under Part D are true and correct copies of those documents, and that to the best of my knowledge and belief this is the only claim filed by members of my household.

*Claimant's Signature_____
Printed Name of Preparer (if other than Claimant)_____
*Date_____
Signature of Preparer (if other than Claimant)**Did you enclose all of your copies?****DID YOU SIGN AND DATE THIS FORM?**_____
Telephone Number of Preparer (if other than Claimant)

EXHIBIT A

Property Tax Rebate Percentage Factor Table

| Total Income | Rebate Percentage Factor |
|--|---------------------------------|
| 0 to \$8,000 | 35% |
| \$8,001 to \$15,000 | 35% |
| \$15,001 to \$18,000 (Homeowners Only) | 35% |
| \$18,001 to \$35,000 (Homeowners Only) | 35% |

Rent Rebate Percentage Factor Table

| Total Income | Rebate Percentage Factor |
|---------------------|---------------------------------|
| 0 to \$8,000 | 35% |
| \$8,001 to \$15,000 | 35% |

The rebate percentage factor will be applied to the rebate amount received by the Claimant from the Commonwealth of Pennsylvania, including supplemental rebates.