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| Reference<br><b>OTC</b><br><b>994</b><br><small>Revised 11-2022</small> | <b>Application for Senior Valuation Freeze<br/>         And/or Additional Homestead</b><br>Return to: Larry Stein - Oklahoma County Assessor's Office<br>320 Robert S. Kerr Ave. Rm. 313<br>Oklahoma City, OK 73102 | <b>TAX<br/>         YEAR<br/>         2023</b> |
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| <b>PART 1</b>  | First Name and Initial (if joint application, give first names and initials of both) _____  |  | Last Name _____  |                     |
|  | Current Mailing Address (number and street, apartment/condo number, or rural route) _____   |  |  |                     |
|  | City and State _____  | Zip Code _____   | Phone Number _____                                       | Email Address _____ |
|  | Physical Address of Property _____  |  | Account Number _____                                     |                     |
|  | A. Was applicant domiciled on the homestead property January 1st of the current year? ..... |  | Yes <input type="checkbox"/> No <input type="checkbox"/> |                     |
| B. Was the applicant age 65 or over as of January 1st of the current year? ..... |   | Yes <input type="checkbox"/> No <input type="checkbox"/> |  |                     |

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| <b>PART 2</b>   | <b>Enter Total Gross Income/Assistance received by ALL members of your household in the previous calendar year.</b>  |  |                |               |  |
|   | 1. Enter total <b>gross</b> (taxable and nontaxable) income from wages, salaries, fees, commissions, bonuses and tips; income from partnerships and estates and trusts, gains or losses from the sale or exchange of property; Include wages paid in cash and EIC received in 2022 ..... |  | <b>Monthly</b> | <b>Annual</b> |  |
|   | 2. Enter <b>gross</b> Business Income &/or <b>gross</b> Farm Income .....  |  |                | X12           |  |
|   | 3. Enter <b>gross</b> Rental Income .....  |  |                | X12           |  |
|   | 4. Enter total Interest Income received in 2022 .....  |  |                | X12           |  |
|   | 5. Other income not listed (specify source) _____ .....  |  |                | X12           |  |
|   | 6. <b>All other Gross household income received from each of the sources listed below:</b>   |  |                |               |  |
|   | A. Social Security Payments (Total including Medicare) .....   |  |                | X12           |  |
|   | B. Spouse Social Security Payments (Total including Medicare) .....  |  |                | X12           |  |
|   | C. Disability Payments (SSI) .....   |  |                | X12           |  |
|   | D. Distributions from Retirement, Pensions and Annuities .....   |  |                | X12           |  |
|   | E. IRA Distribution .....  |  |                | X12           |  |
|   | F. Unemployment Payments/Worker's Compensation .....   |  |                | X12           |  |
|   | G. Mineral rights and all other Royalty Income .....   |  |                | X12           |  |
|   | H. Alimony/Support Money .....   |  |                | X12           |  |
| I. Public Assistance Payments (including EBT payments) .....  |  |  | X12            |               |  |
| J. Total Dependent <b>gross</b> income .....  |  |  | X12            |               |  |
| K. Capital Gains .....  |  |  | X12            |               |  |
| L. Other income received in 2022 (specify) .....  |  |  | X12            |               |  |
| 7. <b>Total Gross Household Income*</b> (add lines 1 thru 6L)<br>If over \$85,300 Freeze application denied. If over \$25,000 Additional Homestead Exemption denied |  |  | <b>Total</b>   |               |  |

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| <b>PART 3</b>  | <b>Signature – I understand that if the applicant is <u>not</u> age 65 or over as of March 15<sup>th</sup>, the application for additional homestead exemption must be filed each year.</b> |                              |                     |
|  | Owner Signature _____   | Social Security Number _____ | Date of Birth _____ |
|  | Co-Owner Signature _____  | Social Security Number _____ | Date of Birth _____ |
|  | Number of occupants in the home _____   | Date of Application _____    |                     |
| <small>*Gross household income is defined in 68 O.S. Section 2890 as used in this section means "the gross amount of income of every type, regardless of the source, received by ALL PERSONS occupying the same household, whether such income as taxable or nontaxable for federal or state income tax purposes, including pensions, annuities, federal social security unemployment payments, public assistance payments, alimony, support money, workmen's compensation, loss of time insurance payments, capital gains and any other type of income received; excluding gifts. The term "gross household income" shall not include any veterans' disability compensation payments.</small> |   |                              |                     |