



Utah State Tax Commission
Renter Refund Application
 (Circuit Breaker Application)

2013
TC-40CB
 Rev. 4/13

Send this application to Taxpayer Services Division, Utah State Tax Commission, 210 N 1950 W, SLC, UT 84134-0800

Renters and Mobile Homeowners applying for lot rental refund, file this application with the Utah State Tax Commission by December 31, 2013.

Homeowners and Mobile Homeowners applying for property tax credit must file TC-40CY with the county where the property is located by September 1, 2013.

Applicants who check box 2 in Section 5 (back of form) must file this form in person.

Section 1 - Applicant's Name If more than one person lives in a household, only one person may file an application.

Applicant's Last Name	Applicant's First Name	Middle Initial	Birth Date	Social Security Number
Spouse's Last Name (if spouse is living)	Spouse's First Name	Middle Initial	Birth Date	Social Security Number
Address	City	County	State	ZIP Code
				Daytime Telephone Number

Section 2 - Household Income Must include **ALL gross income received from all household members**.

Complete and add lines A through I and enter the total on line J. **Household income** is income received during 2012 from all members living in the household as of January 1, 2012, **not just the applicant**. A "household" is an association of all people living in the same dwelling, sharing furnishings, facilities, accommodations and expenses. **Send supporting income documentation for information provided below.**

Total members in household as of January 1, 2012

A. Wages/salaries/tips/other compensation (W-2, 1099Misc, etc.)

A

F. Government assistance

F

B. Total interest income, dividends (taxable/nontaxable)

B

G. Unemployment, worker's compensation

G

C. Pensions, annuities-include IRAs (taxable/nontaxable)(Include a copy of federal return and all schedules. This amount will be reviewed.)

C

H. Business, rental, farm income (Include copy of federal return and all schedules. This amount will be reviewed.)

H

D. Social Security/Railroad retirement (taxable/nontaxable) (send supporting documentation)

D

I. Other income received under Utah Code Section 59-2-1202 such as alimony, nontaxable interest, etc. (send supporting documentation)

I

E. Current year capital gain or loss (Include copy of federal return and all schedules. This amount will be reviewed.)

E

J. Total 2012 household income from all sources (add lines A through I)

J

You do not qualify if the verified amount on line J exceeds \$30,688. The Tax Commission will review and determine eligibility for refund. You may be required to submit additional information to support your claims.

Section 3 - Do You Qualify For A Refund Applicant must answer questions 1 through 5.

- Were you age 66 or older on or before **December 31, 2012**, or are you a widow or widower? Enter spouse's date of death: _____. Attach a copy of your deceased spouse's death certificate if this is the first year you are claiming a refund as a widow or widower.

Yes (Go on to question 2) No (STOP, do not send form)
- Is the amount on line J above **less than or equal to \$30,688**? Household Income is income received during 2012 by all members of a household (not just the applicant) living in the same dwelling, sharing furnishings, facilities, accommodations and expenses as of January 1, 2012.

Yes (Go on to question 3) No (STOP, do not send form)
- Did you furnish your own financial support for 2012 and cannot be claimed as a dependent on someone else's tax return?

Yes (Go on to question 4) No (STOP, do not send form)
- Did you live in Utah for the entire year of 2012? You must have lived in Utah for the entire calendar year to be eligible.

Yes (Go on to question 5) No (STOP, do not send form)
- Are you a mobile homeowner applying for a lot rental refund?

Yes No

Section 4 - Rent Information

List each place you rented during 2012. If you received rental assistance, you can only claim the portion of rent you paid. Provide documented proof (i.e receipts, bank copy of canceled checks) showing how much rent was paid.

Address of apartment or mobile/home lot (include apartment or lot number)	Name and telephone number of landlord or manager	Date rented in 2012 from - to	Total months	Monthly rent you paid	Total rent you paid
		Are utilities included in rent? <input type="checkbox"/> None <input type="checkbox"/> Gas <input type="checkbox"/> Electric			
		Are utilities included in rent? <input type="checkbox"/> None <input type="checkbox"/> Gas <input type="checkbox"/> Electric			
		Are utilities included in rent? <input type="checkbox"/> None <input type="checkbox"/> Gas <input type="checkbox"/> Electric			
		Are utilities included in rent? <input type="checkbox"/> None <input type="checkbox"/> Gas <input type="checkbox"/> Electric			
Total rent you paid in 2012					

Section 5 - Residency Status of Applicant

Under state and federal law we are prohibited from processing this application or issuing a credit to any person who fails to provide this information.

Check one (providing false information subjects the signer to penalties for perjury):

- 1. I am a U.S. citizen and have provided my Social Security Number on the front of this form.
- 2. I qualify under 8 U.S.C. 1641 and I am present in the U.S. lawfully. I-94 Number*: _____

If you checked box 2, you must file this form in person and bring proof of your I-94 Number and Alien Registration Number.

Alien Registration Number*: _____

*The I-94 (arrival/departure) number and the Alien Registration Number are issued by the U.S. Citizenship and Immigration Service.

Under penalties of perjury, I declare that I am a U.S. citizen OR that I qualify under 8 U.S.C 1641 and am present in the United States lawfully.

Signature of applicant X	Date signed
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Section 6 - Certification and Signature Certify, sign and date.

Under penalties of perjury, I declare to the best of my knowledge and understanding, this information is true, correct and complete.

Signature of applicant X	Date	Signature of spouse X	Date
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Preparer's name and address or organization (if not applicant)	Preparer's telephone number
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2012 Household Income Limits		Renter Refund % of rent	Maximum Renter Refund
Lower	Upper		
\$0	\$10,433	9.5%	\$909
10,434	13,913	8.5%	793
13,914	17,389	7.0%	680
17,390	20,867	5.5%	509
20,868	24,347	4.0%	396
24,348	27,618	3.0%	227
27,619	30,688	2.5%	112

Golden Years Center (Bountiful) 801-295-3479 Salt Lake County Division of Aging 801-538-3910 Heritage Center (Clearfield) 801-525-5080 Davis County Aging Services 801-525-5050 Autumn Glows Center (Kaysville) 801-544-1235 Utah State Tax Commission 801-297-6254 or outside Salt Lake area, 1-800-662-4335 or on the web at tax.utah.gov
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