



# Property Tax Assistance Program Application for Tax Year 2023

Form PTAP  
V1 8/2022

[15-6-305, MCA, ARM 42.19.402](#)

ASSESSMENT CODE:

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## Part I. General Information

- Apply by April 15.
- You must meet income and property ownership/occupancy requirements every year.
- The benefit only applies to the first \$200,000 of value of your primary residence. For agricultural and timber parcels, the only eligible land is the one-acre home site.
- Once you have applied for the program, we will notify you each year whether you qualify. You will be included in the program's annual income verification until you move from your residence.

## Part II. Required Information

**Property Owner Name**

**Spouse's Name**

\_\_\_\_\_

\_\_\_\_\_

Birth Date \_\_\_\_\_  Male  Female

Birth Date \_\_\_\_\_  Male  Female

Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Social Security Number \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Contact Phone Number \_\_\_\_\_

Contact Phone Number \_\_\_\_\_

County \_\_\_\_\_

**Applicant's Mailing Address**

**Applicant's Primary Residence Physical Address**

\_\_\_\_\_

\_\_\_\_\_

Did you file a Montana income tax return for Tax Year 2021? .....  Yes  No

Provide your 2021 Federal Adjusted Gross Income (FAGI), excluding capital and income losses.  
If you are married, include your spouse's income whether or not the spouse is an owner of the property ..... \$ \_\_\_\_\_  
If you are new to Montana, provide a copy of your 2021 federal income tax return.

Is your only income from Social Security, veterans' benefits and/or other nontaxable sources? .....  Yes  No  
If yes, include a copy of your Social Security statement and/or other income documentation with this completed application form.

If this application is for a mobile or manufactured home, do you own the land upon which your home is located? .....  Yes  No

**Return your completed and signed application** to your local Department of Revenue field office. Your application must be postmarked or hand delivered by April 15. Go to [MTRevenue.gov](http://MTRevenue.gov) for the mailing addresses of our field offices, or call us at (406) 444-6900 or Montana Relay at 711 for hearing impaired. (If you miss the deadline, apply as soon as possible to ensure you are included in the program's verification process for the following tax year.)

**Important!** Your signature is required in Part IV.

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### Part III. Qualifying Criteria

You must own or currently be under contract to purchase your home or mobile/manufactured home and live in the home as your primary residence for at least seven months of the year.

For Tax Year 2023, the income guidelines are:

- A single applicant's 2021 Federal Adjusted Gross Income (FAGI), excluding capital and income losses, must be less than \$24,607.
- Head of household and married applicants' 2021 FAGI must be less than \$32,810.
- Spouses' incomes are included regardless of whether they are owners of the property.

You only need to report your income one time. In future years, we will determine your eligibility through our annual verification process.

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### Part IV. Affirmation and Signature(s)

Under penalty of law, I/we affirm that I/we are owners of the property on which we are applying for the property tax benefit, that I/we occupied the property as my/our primary residence for at least seven months of a calendar year, and that the information provided in this application form is true and correct.

X Property Owner Signature \_\_\_\_\_ Date \_\_\_\_\_

X Property Owner's Spouse Signature \_\_\_\_\_ Date \_\_\_\_\_

X Signature of Person Completing this Form  
(if other than applicant) \_\_\_\_\_ Date \_\_\_\_\_

Printed Name \_\_\_\_\_ Phone \_\_\_\_\_

Relationship to Applicant \_\_\_\_\_ Email or Other Contact Information \_\_\_\_\_

Please let us know how you heard about the Property Tax Assistance Program (PTAP).

\_\_\_\_\_

\_\_\_\_\_

**Questions?** Call us at (406) 444-6900 or Montana Relay at 711 for the hearing impaired, or visit our website at [MTRevenue.gov](http://MTRevenue.gov)

### 2023 Income Guidelines for the Property Tax Assistance Program

Single Person	Married or Filing Head of Household	Percent Reduction
\$0 – \$9,843	\$0 – \$13,124	80%
\$9,844 – \$15,093	\$13,125 – \$22,967	50%
\$15,094 – \$24,607	\$22,968 – \$32,810	30%