



## CITY OF PORTLAND

389 Congress Street  
Portland, Maine 04101

# Portland Senior Tax Equity Program (P-STEP)

## Application Instructions

The Portland Senior Tax Equity Program (P-STEP) provides tax relief to low-income seniors who live in the City of Portland. To qualify, applicants must be 62 years of age or older with a homestead in Portland. Applicants must also have received a Maine Property Tax Fairness Credit in the tax year prior to the P-STEP application. If you do not qualify or did not receive a rebate under the State program you will not be eligible for the City of Portland P-STEP. The application period for the City of Portland program runs from February 13, 2020 and June 15, 2020. Application instructions are below:

1. Fully complete the program application available at City Hall or [online](#).
2. Attach a *signed* copy of your 2019 Form 1040ME, **including** Schedule PTFC (Property Tax Fairness Credit).

3. Return the application to:

City of Portland  
Attn: Treasury Department  
389 Congress Street  
Portland, ME 04101

4. Application period for the 2019 tax year runs from February 13, 2020 through June 15, 2020. Please remember that you must complete an application *every year* in order to participate in the program. You must also receive the Property Tax Fairness Credit for the tax year prior to the application year in order to be eligible for the City of Portland program. You may be asked to provide proof of the property tax paid, copies of rent receipts or canceled checks, and copies of the State refund received before a municipal refund is issued.

*If you have any questions or need assistance completing the application, please contact the City of Portland Treasury Department at 207-874-8490. If all representatives are working with other customers and you reach a voicemail please leave a message - all calls are returned within one business day.*



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### **P-STEP Frequently Asked Questions**

***What is the age requirement?*** Applications for the 2019 tax year will only be considered from those who were age 62 or older by December 31, 2019. For homes owned jointly, only one of the applicants must be over the age limit.

***What if I haven't filed my State Income Tax forms yet (Form 1040ME)?*** You must wait until you have completed your 2019 1040ME and it has been accepted by the State, including Schedule PFTC (Property Tax Fairness Credit) before you apply for the City's program. Proof that the PFTC may be requested by the City prior to credit being granted.

***I rented for part of the year and owned my own home for part of the year. Am I eligible for a refund?*** Yes, if you otherwise qualify. List the tax assessed for the part of the year you owned and occupied your own home and claim the amount of rent you paid for the portion of the year you rented. Remember that each home must have been your primary home during each time period.

***Do I have to provide my phone number and what will it be used for?*** Yes, we must have a daytime phone number provided in case we have questions about your application. We will not call unless we require additional information. We will not give out your phone number to any other party or agency.

***Will I automatically be sent an application next year?*** Yes, if you qualified for a refund this year, we will automatically send you an application next January. During the first year of the program applications will not be mailed, they will only be available online at [www.portlandmaine.gov](http://www.portlandmaine.gov) and also in the Treasury and Assessors offices on the first floor of City Hall at 389 Congress Street.

***How much benefit am I eligible for?*** Program benefit to an eligible applicant shall be the lesser of the following amounts: (a) The amount of credit the applicant qualified for under the state PFTC program; (b) Nine hundred dollars (\$900.00); or (c) A pro rata share of available monies in the P-STEP program fund based on the amount of each eligible applicant's credit under the state program.



Please Return Completed Application To:  
**CITY OF PORTLAND**  
389 Congress Street  
Portland, Maine 04101  
Attention: Treasury Department

**Portland Senior Tax Equity Program**

**(P-STEP)**

For Property Tax Assessed as of April 1, 2019

**Application Period:**  
**February 13, 2020 to June 15, 2020 for Tax Year 2019**

<i>Applicant's First Name</i>	<i>MI</i>	<i>Applicant's Last Name</i>
<i>Applicant's Social Security Number</i>		<i>Applicant's Date of Birth (mm-dd-yyyy)</i>
<i>Spouse's First Name</i>	<i>MI</i>	<i>Spouse's Last Name</i>
<i>Spouse's Social Security Number</i>		<i>Spouse's Date of Birth</i>

<i>Mailing Address (P.O. Box, street and apartment number)</i>		
<i>City</i>	<i>State</i>	<i>Zip Code</i>

<i>Daytime Telephone Number</i>
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Please answer the following questions:

	YES	NO
1a. At the end of the tax year (12/31/19) was the applicant 62 years of age or older? Please attach proof of ID.	<input type="checkbox"/>	<input type="checkbox"/>
1b. If the applicant owns a home, has he/she applied for a homestead property tax exemption?	<input type="checkbox"/>	<input type="checkbox"/>
1c. If the applicant owns his or her homestead, has the applicant paid in full all property taxes for the year for which the refund is requested? If the applicant rents his or her homestead, has the applicant paid in full all rent due during the year for which the refund is requested? Renters should also complete <b>Appendix A</b> of the application.	<input type="checkbox"/>	<input type="checkbox"/>
1d. Has applicant filed Form 1040ME, including PTFC (Property Tax Fairness Credit) for the prior tax year (2019)? <b>Please attach a copy of the Form 1040ME and PTFC.</b>	<input type="checkbox"/>	<input type="checkbox"/>
2. What is the physical location of the property where you lived during 2019 (if different from mailing address above) _____ _____		

*Under penalties of perjury*, I declare that I have examined this application and to the best of my knowledge and belief, it is true, correct and complete. Applications may be audited either before or after refunds are issued.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Preparer  
(other than applicant)

\_\_\_\_\_  
Date



## Appendix A - Landlord and Tenant Rent Payment Confirmation

<i>Applicant's First Name</i>	<i>MI</i>	<i>Applicant's Last Name</i>
<i>Landlord's First Name</i>	<i>MI</i>	<i>Landlord's Last Name</i>

<i>Mailing Address of Property Being Rented</i>		
<i>City</i>	<i>State</i>	<i>Zip Code</i>

<i>Landlord Phone Number</i>
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<i>Amount of Rent Paid by Tenant to Landlord during Tax Year 2019</i>
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<hr/> <i>Signature of Applicant</i>	<i>Date</i>	<hr/> <i>Signature of Landlord</i>	<i>Date</i>
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**NOTE: Please complete this form for each property where rent was paid during tax year 2019**