

The Real Estate Installment Plan is for low-income taxpayers and senior citizens who own and live in their home. If eligible, you can pay your current-year Real Estate Tax in monthly installments.

This application is for **new applicants only!** If you participated in this program last year, you are automatically enrolled this year, unless you **did not** complete the plan.

Everyone must complete pages 1-2 of this application. The Department of Revenue will contact you if we need income documents. If you are eligible as a senior citizen, you must provide proof of age.

The deadline to apply is **March 31, 2022.**

1 Program eligibility questions

Senior Citizen Eligibility

Are you or your live-in spouse over 65 years?

YES NO

Date of Birth (MM/DD/YY) _____

Spouse Date of Birth (if applicable) _____



If you answered **yes** to this question, please continue to the next page. The next section does not apply to you.



You must send a photocopy of your proof of age with this application.

Income eligibility (not for senior citizens)

If you are not a senior citizen, your annual income **must** fall below the cap set for your family size.

First, enter your family size. Then, use the worksheet below and enter your **2020** annual household income. Finally, use the chart on your right to check if you meet the income eligibility for the program.

Family size _____

| INCOME SOURCE | HOUSEHOLD INCOME |
|---------------------------------------------------------------------------------------------------------|------------------|
| Social Security Benefits (include SSI, SSD, etc.) Do not include any Medicare Part B premiums | |
| Pensions and other retirement benefits Include railroad benefits, taxable portion of IRAs etc. | |
| Take home pay Include salary, wages, self-employment income etc. | |
| Interests, dividends, and capital gains prizes Do not subtract losses | |
| Net rental and business income Do not subtract losses | |
| Other income Include unemployment compensation, alimony etc. | |
| TOTAL | |

| Family size | Income cap |
|-------------|------------|
| 1 | \$33,100 |
| 2 | \$37,800 |
| 3 | \$42,550 |
| 4 | \$47,250 |
| 5 | \$51,050 |
| 6 | \$54,850 |
| 7 | \$58,600 |
| 8 | \$62,400 |

Continue to next page



2 Applicant Information

Owner Name _____

Social Security Number
(complete nine digits) _____

Property Address _____

OPA Number _____

Spouse name (if applicable) _____

Spouse Social Security Number (if applicable) _____

Number of household members _____

Phone number _____

Email Address _____



You **must** provide the name and complete Social Security Number or ITIN for the applicant.

3 Signature

The Department of Revenue will also use this application to enroll you in the Homestead Exemption program if you do not already have it. The Homestead Exemption can save you money on your property taxes.

The Department of Revenue is authorized to perform an income verification check at any time. If during your enrollment in the program the city determines you were not income eligible, you will be removed from the program. Any previous payments will be applied to your 2021 Real Estate Tax bill.

If needed, Revenue will make its best efforts to contact Installment Plan applicants and participants. This may include letters, phone calls, emails, or SMS (text) messages.

I have reviewed all the information on this form and I certify that this information is true and correct to the best of my knowledge, information and belief.

| | |
|---------------------------|-------------------|
| Applicant Signature _____ | Date _____ |
| Cell Number _____ | Home Number _____ |



Mail completed forms to:

Philadelphia Department of Revenue
P.O. Box 53190
Philadelphia, PA 19105

or return in person:

Municipal Services Building
Department of Revenue
1401 John F. Kennedy Blvd—Concourse
Philadelphia, PA 19102

Hope Plaza
N. 22nd & W. Somerset St.
Philadelphia, PA 19132

Northeast Municipal Services Center
7522 Castor Ave.
Philadelphia, PA 19152

Department of Revenue Use Only

- Approved
- Rejected

Reason for rejection

- Incomplete/Invalid application
- Current year taxes paid in full
- Off-site mailing address
- Income
- Other
- Multiple property owner