

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

2009
TC-40CB
 Rev. 5/09

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

Get forms online - tax.utah.gov

Renters and Mobile Homeowners applying for lot rental refund, file this application with the Utah State Tax Commission by December 31, 2009.

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

Applicant's Name If more than one person lives in a household, only one person can 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

Do You Qualify For A Refund?

APPLICANT must answer questions 1 through 5.

- Were you age 65 or older on or before **December 31, 2008**, **OR** are you a widow or widower? Yes No
 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. (Go on to question 2) (STOP, you do NOT qualify)

Total members in household as of Jan. 1, 2008 _____
- 2008 Household Income** (from all household members living in the household as of January 1, 2008, not just applicant).

A. Wages/salaries/tips/other compen.	A	J. Total 2008 household income from all sources (add lines A through I)	J
B. Total interest, dividends (taxable/nontaxable)	B	Are you eligible to claim a dependent as a personal exemption on your 2008 federal income tax return?	
C. Pensions, annuities (incl. IRAs)	C	<input type="checkbox"/> No (enter total 2008 household income from line J to line K)	
D. Soc. Sec./Railroad retirement (taxable/nontaxable)	D	<input type="checkbox"/> Yes (subtract \$1,000 from line J and enter result on line K)	
E. Capital gains, loss carry forwards	E	K. Adjusted 2008 household income	K
F. Government assistance	F		
G. Unemployment, worker's comp.	G		
H. Business, rental, farm income	H		
I. Other income (alimony, etc.)	I		
- Is the amount in line K above **less than or equal to \$28,732**? Household Income is income received during 2008 by all members of a household (not just the applicant) living in the same dwelling, sharing furnishings, facilities, accommodations and expenses as of Jan. 1, 2008. Yes (Go on to question 3) No (STOP, you do NOT qualify)
- Did you furnish your own financial support for 2008 and cannot be claimed as a dependent on someone else's tax return? Yes (Go on to question 4) No (STOP, you do NOT qualify)
- Did you live in Utah for the entire year of 2008? You must have lived in Utah for the entire calendar year to be eligible. Yes (Go on to question 5) No (STOP, you do NOT qualify)
- Are you a **mobile homeowner applying for a lot rental refund**? Yes No

Section One - Rent Information

Complete this section for each place you rented **during 2008**. If you received rental assistance, you can only claim the portion of rent you paid.

Address of apartment or mobile/home lot (include apartment or lot number)	Name and telephone number of landlord or manager	Date rented in 2008 from - to	Total months	Monthly rent you paid	Total rent you paid
		Utilities included in rent? None <input type="checkbox"/> Gas <input type="checkbox"/> Electric <input type="checkbox"/>			
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Total rent you paid in 2008 (This amount should not include the cost of utilities)

Section Two - 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. The Alien Registration Number and the I-94 numbers are issued by the U.S. Citizenship and Immigration Service.

Check one:

I am a U.S. citizen. SSN: _____

I qualify under 8 U.S.C. 1641 and I am present in the U.S. lawfully. I-94 #: _____

Alien #: _____

Section Three - 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
Preparer's name and address or organization (if not applicant)			Preparer's telephone number

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Renter Refund Schedule			
2008 Household Income Limits		Renter Refund % of rent	Maximum Renter Refund
Lower	Upper		
\$0	\$9,768	9.5%	\$851
9,769	13,026	8.5%	742
13,027	16,281	7.0%	637
16,282	19,537	5.5%	477
19,538	22,795	4.0%	371
22,796	25,858	3.0%	212
25,859	28,732	2.5%	105

For More Information Contact:

Golden Years Center (Bountiful) 801-295-3479
 Salt Lake County Division of Aging 801-468-2480
 Heritage Center (Clearfield) 801-773-7065
 Davis County Aging Services 801-451-3377
 Autumn Glows Center (Kaysville) 801-451-3329
 Utah State Tax Commission 801-297-2200 or outside Salt Lake area, 1-800-662-4335 or on the web at tax.utah.gov