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YEAR 2005

Homeowner Assistance Claim (for income received in 2004)

CALIFORNIA FORM 9000H

STEP 1 Name and address

Your first name | Initial | Last name

Spouse's first name | Initial | Last name

Present home address — number and street, PO Box or rural route | Apt. no. | PMB no.

City, town, or post office | State | ZIP Code

STEP 2 Social security number (SSN)

Your SSN

Your Spouse's SSN

IMPORTANT: Your SSN is required.

STEP 3 Filing status

1. **Are you a United States citizen? Check "Yes" or "No"** . . . . . • 1. ☐ YES ☐ NO
   If you checked "Yes," skip line 2 and go to line 3.
   If you checked "No," go to line 2.
2. **Benefit Eligibility for Noncitizens** . . . . . • 2a. Alien Status Code
   If you are not a citizen of the United States, go to page 10. If you have a qualifying alien status for the United States, enter your alien status code from the chart on page 10 on line 2a. Then enter your alien registration number on line 2b and your date of entry into the United States on line 2c. (MM/DD/YYYY) • 2b. Alien Registration Number • 2c. / / Date of Entry
3. Check the appropriate box if you were **one** of the following on December 31, 2004:
   - ◯ A. 62 years or older (See **Note** on page 5, line 3a) . . . . . • A ☐
   - ◯ B. Under 62 and blind . . . . . • B ☐
   - ◯ C. Under 62 and disabled (not blind) . . . . . • C ☐
4. **Enter your date of birth** (example: 0 5/ 2 1 / 1 9 4 2) . . . . . • 4. / / Date of Birth
   You must enter your date of birth MM DD YYYY
   See instructions on page 5 to see if you must attach a proof document to your claim. If you cannot check one of the boxes, STOP HERE. You do not qualify to file for a Homeowner Assistance claim.

STEP 4 Property information

5. **Did you own and live in your home on December 31, 2004** . . . . . 5. ☐ YES ☐ NO
   If "No," STOP. You do **not** qualify for homeowner assistance.
   a. **Enter the NET value of your property.** See page 6 . . . . . ◯ • 5a. $ 1
6. **Is your property used for rental and/or business as well as personal use?** . . . . . ◯ 6. ☐ YES ☐ NO
   If you checked "Yes," enter the estimated percentage of property devoted to your personal use. See page 6 . . . . . ▶ 6a. 100 %
7. **List name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill.** See page 6.

Name	Relationship	Did this person live in your home in 2004?
		☐ YES ☐ NO
		☐ YES ☐ NO
		☐ YES ☐ NO

Enter your percentage of ownership . . . . . ▶ 7. 100 %

For Privacy Act Notice, see Page 9.

Complete Side 2, Step 5 Through Step 9.

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STEP 5
Yearly income of household members

Enter your household income for the 2004 calendar year below. Include the income of your spouse and certain other household members. See instructions for other household members on page 6 and page 7.

		(Dollars)	(Cents)
8. Social Security and/or Railroad Retirement	8.		
9. Interest, Dividends, and/or Gain (or Loss)	9.		
10. Pensions, Annuities, and IRA distributions	10.		
11. SSI/SSP, (Gold Check). See page 7 (full-year total)	11.		
12. Rental and Business Income (or Loss). See page 7	12.		
13. Other Income (including wages). See page 7	13.		
14. SUBTOTAL. Add line 8 through line 13	14.	$0	00

STEP 6
Adjustments to income

15. Adjustments to income. See page 7	15.	$0	00

STEP 7
Total household income

16. TOTAL HOUSEHOLD INCOME IN 2004. Subtract line 15 from line 14. If line 16 is more than $39,699, STOP. **You do not qualify.**	● 16.	$0	00

Do you receive Temporary Assistance for Needy Families, formerly Aid to Families with Dependent Children (AFDC)? ☐ YES ☐ NO

STEP 8
Property tax paid and homeowner assistance claimed

17. PROPERTY TAX FOR 2004/2005 DO NOT INCLUDE SPECIAL OR DIRECT ASSESSMENTS. Amount on line 17 cannot exceed 1% of the full value of the home. See page 8 to see if you must attach a copy of your 2004/2005 property tax bill.	○ ● 17.	0	00

You do not have to complete line 18. If you stop here, we will figure the amount of assistance for you.

18. Homeowner assistance claimed. **(Cannot exceed $472.60)** See page 8	■ 18.	0	00

Reminder

If this is your first year filing a Homeowner Assistance claim and you did not receive SSI, please provide proof of your age, disability, or blindness.

If you filed a claim last year and are under 62 years old, you will need to provide proof of your temporary disability if you did not receive SSI. (This is an annual requirement.)

STEP 9
Signature, date, and telephone number

Caution: To avoid delay of your check, be sure to provide all requested information, sign below, and mail to: **FRANCHISE TAX BOARD, PO BOX 942886, SACRAMENTO CA 94286-0904.**

I authorize the Franchise Tax Board to match my name and the information provided herein, as well as information necessary to process my claim, against information gathered from public records, the files of the Department of Health Services, and other state or federal agencies to confirm my eligibility for the Homeowner Assistance Program.

Under penalties of perjury, I declare that this claim and all statements regarding my eligibility and citizenship or alien status, including accompanying schedules and any additional information I may provide to the Franchise Tax Board are to the best of my knowledge, true, correct, and complete. By signing this claim, I authorize the Franchise Tax Board to mail any assistance to which I am entitled, pursuant to this claim, to the address listed in step one.

Sign Here ➧

X_____ Date_____
Claimant's signature

Claimant's Daytime Telephone Number ● ( )_____

Paid Preparer's Use Only

PREPARER'S SIGNATURE ▶	Date	Check if self-employed ☐	Preparer's social security number/PTIN
FIRM'S NAME (OR YOURS, IF SELF-EMPLOYED) AND ADDRESS ▶			FEIN
			TELEPHONE ( )

Do not write in this space

Do not write in this space

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Line 7 – Landlord Information
Enter the name, address, and telephone number of your landlord or the person to whom you paid rent during 2004. If you had more than one landlord, attach a list of your other landlords with their names, addresses, telephone numbers, and dates rented.

Homeowner Property Information

Line 5 – Own and Live in a Home
You must have owned **and** lived in your home in California on December 31, 2004. A home may include a floating home or houseboat, your own condominium, "own-your-own" apartment, or a mobile or manufactured home taxed as property. If you pay a vehicle-type tax on your mobile or manufactured home to the Department of Housing and Community Development, you may file a claim for **either** homeowner assistance or for renter assistance. You may not file claims for both.

Line 5a – Net Value
Enter the net value of your property on line 5a. The net value of your property is the value of your property as shown on your 2004/2005 property tax bill. This may also be identified as full cash value, full market value, or full value.

Note: Homeowner assistance is granted **only** on the first $34,000 of the net value as shown on your property tax bill. Assistance will not be allowed on that part of the net value (after homeowner's or veteran's exemption) of a residential dwelling that is more than $34,000.

Line 6 – Personal Use
If your property was used entirely for your personal use in 2004, check "No" and go to line 7. If you use part of your property for rental and/or business purposes, check "Yes" and enter your best estimate of the percentage of your property devoted to your personal use on line 6a. The percentage of your property you use as your home may be figured by the number of rooms, square footage, or any similar measure. For example, if you have five rooms in your home, use three rooms for your personal use and rent the other two rooms, your percentage of personal use would be figured this way:

$$\frac{\text{3 rooms personal use}}{\text{5 rooms total}} = 60\% \text{ personal use}$$

If you check "Yes," you must complete line 12.

Line 7 – Names on Your Property Tax Bill
List the name(s) and relationship(s) of anyone, other than yourself, who is included on your property tax bill. Indicate whether they lived in your home in 2004 by checking "Yes" or "No."

Enter 100% as your percentage of ownership if the name(s) listed on your 2004/2005 property tax bill include only your spouse or any of the following persons related to you or to your spouse:

- Parents;
- Children or their spouses; or
- Grandchildren or their spouses.

Note: Death or divorce ends the relationship of any individual above who is related to the claimant only by marriage.

Note to Homeowners: You may file only one claim per household each year. Only one owner-claimant is entitled to payment per year. When two or more individuals of a household meet the qualifications, they should decide who will file the claim.

If your interest in your property is a recorded life estate, you are entitled to assistance on the tax assessed on your property.

Complete the following worksheet only if there are owners on your 2004/2005 property tax bill other than the relatives listed above and each owner has an equal percentage of ownership. If each owner does not have an equal percentage of ownership, do not complete the worksheet. Instead, go to line 7 of form FTB 9000H and enter your percentage of ownership.

1. Total number of owners listed on your 2004/2005 property tax bill 1. 1
2. Number of owners, other than those listed above who did not live with you during the period January 1, 2004, through December 31, 2004 . . . . . 2. 0
3. Subtract line 2 from line 1 . . . . . 3. 1
4. Divide the amount on line 3 by the amount on line 1. This is your percentage of ownership of the home. Enter this percentage on form FTB 9000H, line 7 . . 4. 100

STEP 5 Income of Household Members – Renters and Homeowners

You must enter the total household income received by all household members for the entire 2004 calendar year. Total household income from all members includes your income, your spouse's income if you are married, and the income received by any other person who lived in your home (only enter the income that the other persons received while living in your home during the 2004 calendar year). However, do not include the income of minors, full-time students (under the age of 24 years), or renters.

Line 8 – Social Security/Railroad Retirement
Enter the total **yearly** amount of social security (including the amount deducted for Medicare premiums) and railroad retirement received by any household member, regardless of its source or taxability.

Line 9 – Interest, Dividends, and/or Gain (or Loss)
Enter the combined total **yearly** amount of interest, dividends, and capital gain (or loss) received by any member of the household, regardless of source or taxability.

Combine the amount of income (or loss) from the sale of assets with total yearly interest and dividends. You may use California Schedule D, Capital Gain or Loss Adjustment, to figure California gain or loss (not the adjustment). The maximum deductible net loss from the

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Worksheet to Figure the Amount of Homeowner Assistance, Form FTB 9000H

If you want, we will figure the amount of homeowner assistance for you. You may, however, figure this amount by completing line 1 through line 9 for those items that apply to you.

Complete only if the net value of your property as shown on your 2004/2005 property tax bill is more than $34,000.

1. Enter the net value shown on form FTB 9000H, line 5a . . . . . 1. $ 1
2. Divide $34,000 by the amount on line 1 above (100% maximum) . . . . . 2. 100 %

Complete only if your property is used for rental and/or business purposes as well as for your home.

3. Enter the percentage of your home devoted to your personal use shown on form FTB 9000H, line 6a . . . . . 3. 100 %

Complete only if there are owners (other than you and your spouse, or the parents, children, grandchildren [or their spouses] of you or your spouse) listed on your property tax bill who do not live in your home.

4. Enter the percentage of your ownership shown on form FTB 9000H, line 7 . . . . . 4. 100 %

Figure the amount of homeowner assistance.

5. Enter the property tax for 2004/2005 shown on form FTB 9000H, line 17 . . . . . 5. $ 0.00
6. Enter the smallest percentage from line 2, line 3, or line 4 above. Enter 100% if line 2, line 3, and line 4 are blank . . . . . 6. x 100 %
7. Multiply the amount on line 5 by the percentage on line 6. Enter this amount or $340.00 whichever is smaller . . . . . 7. $ 0.00
8. Find your total household income on the Homeowner Assistance Schedule below and enter the percentage of assistance here . . . . . 8. x 139 %
9. Homeowner assistance. Multiply the amount on line 7 by the percentage on line 8. Enter this amount on form FTB 9000H, line 18 . . . . . 9. $ 0.00

Homeowner Assistance Schedule

If your total household income is		Your percentage of assistance is	If your total household income is		Your percentage of assistance is
From	To		From	To	
$0	$9,923	139%	21,837	22,497	59%
9,924	10,585	136%	22,498	23,159	54%
10,586	11,247	133%	23,160	23,819	49%
11,248	11,909	131%	23,820	24,480	45%
11,910	12,571	128%	24,481	25,144	41%
12,572	13,233	125%	25,145	25,805	36%
13,234	13,894	122%	25,806	26,466	32%
13,895	14,556	119%	26,467	27,127	29%
14,557	15,218	116%	27,128	27,789	26%
15,219	15,880	113%	27,790	28,450	23%
15,881	16,540	110%	28,451	29,112	20%
16,541	17,202	106%	29,113	29,774	17%
17,203	17,865	100%	29,775	31,429	15%
17,866	18,527	94%	31,430	33,083	12%
18,528	19,188	88%	33,084	34,737	10%
19,189	19,849	83%	34,738	36,391	9%
19,850	20,511	77%	36,392	38,045	7%
20,512	21,172	71%	38,046	39,699	6%
21,173	21,836	65%	$39,700	And Over	0%