

K-40SVR

(7-22)

2022

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137022

**KANSAS PROPERTY TAX RELIEF CLAIM
for SENIORS and DISABLED VETERANS**

TESTMELXXXXX A TESTWATERSXXXXXXXXXXXX
1234 TESTJEFFERSON STREETXXXXXXXXXXXX
TESTINOFOTTOOPPEEKAAA KS 66612-1234

TEST
SN

234007890
7855551212

Claimant died during 2022 - Date of death 05152022 Name or address has changed? Filing an amended claim

NOTE: If you filed a K-40H or K-40PT for 2022, you DO NOT qualify for this refund.

Qualifications - To qualify for this property tax refund you must have been a resident of Kansas the entire year of 2022 and own your home.
Answer only the question(s) that apply to you.

- 1. Age **65** or over for the entire year? Enter your date of birth (must be prior to 1957). 01151956
- 2. Disabled veteran for the entire year? Enter the date the disability began. 07151978
ENCLOSE your Veterans Affairs Award Letter showing disability rating.
- 3. The surviving spouse of a claimant who was either a disabled veteran or person 65 years of age or older for the entire year? Enter the date the claimant became a surviving spouse. 12152020
For the surviving spouse to qualify, the disabled veteran or person 65 years of age or older must have been receiving benefits pursuant to this act at the time of their death. If you are the surviving spouse of a disabled veteran, you must complete line 2.

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- 4. 2022 Wages OR KAGI \$ 87533 plus Federal Earned Income Credit \$ 10000 . Enter the total. 60789
(If amount(s) are a negative, enter zero.)
 - 5. All taxable income other than wages and pensions not included in line 4. (Do not subtract net operating and capital losses.) 70212
 - 6. Total Social Security and SSI benefits, including Medicare deductions, received in 2022 (do not include disability payments from Social Security or SSI). \$ 10000 , enter 50% if this total. 80123
 - 7. Railroad Retirement benefits and all other pensions, annuities, and veterans benefits. (Do not include disability payments from Veterans and Railroad Retirement.) 90789
 - 8. TAF payments, general assistance, worker's compensation, grants and scholarships. 10212
 - 9. All other income, including income of others who resided with you at any time during 2022. 11123
 - 10. **TOTAL HOUSEHOLD INCOME.** (Add lines 4 – 9. If line 10 is more than \$50,000, you do not qualify for a refund.) 12789
 - 11. General property taxes **paid timely** in 2022, excluding specials. (Tax on property valued at more than \$350,000 does not qualify.) 1323
 - 12. The amount of General property taxes **paid timely** in base year. 1489
 - 13. **PROPERTY TAX REFUND.** (Subtract line 12 from line 11). 1523

Check if you wish to participate in the Refund Advancement Program.

I authorize the Director of Taxation or the Director's designee to discuss my K-40SVR and enclosure with my preparer.
I declare under the penalties of perjury that to the best of my knowledge and belief this is a true, correct, and complete return.

IMPORTANT: Please allow 20 to 24 weeks to process your refund.

Claimant's Signature (Required) _____ Date _____

Preparer Signature (Required) _____ Preparer Phone Number _____

Preparer PTIN, EIN, or SSN (Required) P03465080

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Answer only the question(s) that apply to you.

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2. Disabled veteran for the entire year? Enter the date the disability began. 07151978
ENCLOSE your Veterans Affairs Award Letter showing disability rating.

3. The surviving spouse of a claimant who was either a disabled veteran or person 65 years of age or older for the entire year? Enter the date the claimant became a surviving spouse. 12152020
For the surviving spouse to qualify, the disabled veteran or person 65 years of age or older must have been receiving benefits pursuant to this act at the time of their death. If you are the surviving spouse of a disabled veteran, you must complete line 2.

4. 2022 Wages OR KAGI \$ 87533 plus Federal Earned Income Credit \$ 10000 . Enter the total. 60789
(If amount(s) are a negative, enter zero.)

5. All taxable income other than wages and pensions not included in line 4. (Do not subtract net operating and capital losses.) 70212

6. Total Social Security and SSI benefits, including Medicare deductions, received in 2022 (do not include disability payments from Social Security or SSI). \$ 10000 , enter 50% if this total. 80123

7. Railroad Retirement benefits and all other pensions, annuities, and veterans benefits. (Do not include disability payments from Veterans and Railroad Retirement.) 90789

8. TAF payments, general assistance, worker's compensation, grants and scholarships. 10212

9. All other income, including income of others who resided with you at any time during 2022. 11123

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11. General property taxes **paid timely** in 2022, excluding specials. (Tax on property valued at more than \$350,000 does not qualify.) 1323

12. The amount of General property taxes **paid timely** in base year. 1489

13. **PROPERTY TAX REFUND.** (Subtract line 12 from line 11). 1523

Check if you wish to participate in the Refund Advancement Program.

I authorize the Director of Taxation or the Director's designee to discuss my K-40SVR and enclosure with my preparer.
I declare under the penalties of perjury that to the best of my knowledge and belief this is a true, correct, and complete return.

IMPORTANT: Please allow 20 to 24 weeks to process your refund.

Claimant's Signature (Required) _____ Date _____

Preparer Signature (Required) _____ Preparer Phone Number _____ Preparer PTIN, EIN, or SSN (Required) P03465080

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(7-22)

2022

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137122

**KANSAS PROPERTY TAX RELIEF CLAIM
for SENIORS and DISABLED VETERANS**

TESTMELXXXXX A TESTWATERSXXXXXXXXXXXX

TEST

234007890

Excluded Income:

Providing this information should speed up the processing of your claim. Income reported here should **not** be included on line 10 of this form.

14. Enter in the spaces provided the **annual amount of all other income** not included as household income on line 10:

(a) Food stamps	98714	(b) Nongovernmental Gifts	98717
(c) Child support	98715	(d) Settlements (lump sum)	98718
(e) Personal and Student Loans	98716	(f) SSI, Social Security, Veterans or Railroad Disability	98719
(g) Other: Source _____		Amount	98720

Members of Household:

15. List the names of **ALL** persons who resided in your household **at any time** during 2022. Specify the number of months they lived with you and report their portion of income that is **included** in the total household income on line 10. Enclose additional sheets if needed and only after completing the 15 lines below.

Name	# of Months	Portion of income that is included on line 10	SSN
TESTTIBERIOUS J TESTERSAMPLEPERSONS	12	13212	123456781
MAREGOLD M TESTERSAMPLEPERSONS	12	23212	234567892
JOSEPH J TESTERSAMPLEPERSONS	12	33212	345678903
XX	00	00000	000000004
XX	00	00000	000000005
XX	00	00000	000000006
XX	00	00000	000000007
XX	00	00000	000000008
XX	00	00000	000000009
XX	00	00000	000000010
XX	00	00000	000000011
XX	00	00000	000000012
XX	00	00000	000000013
XX	00	00000	000000014
XX	00	00000	000000015

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KANSAS PROPERTY TAX RELIEF CLAIM for SENIORS and DISABLED VETERANS

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234007890

Excluded Income:

Providing this information should speed up the processing of your claim. Income reported here should not be included on line 10 of this form.

14. Enter in the spaces provided the annual amount of all other income not included as household income on line 10:

Table with 2 columns: Description (a-g) and Amount. Includes rows for Food stamps, Child support, Personal and Student Loans, etc.

Members of Household:

15. List the names of ALL persons who resided in your household at any time during 2022. Specify the number of months they lived with you and report their portion of income that is included in the total household income on line 10. Enclose additional sheets if needed and only after completing the 15 lines below.

Table with 4 columns: Name, # of Months, Portion of income that is included on line 10, and SSN. Lists household members like TESTTIBERIOUS J TESTERSAMPLEPERSONS.

HOMESTEAD CLAIM PO BOX 750260 TOPEKA KS 66699-0260

K-40SVR LINE-BY-LINE INSTRUCTIONS

If you filed a Form K-40H or K-40PT for 2022, you cannot claim this refund.

NAME AND ADDRESS

Use the instructions for Form K-40H on page 4 to complete the personal information at the top of Form K-40SVR.

QUALIFICATIONS

Line 1: Age 65 or over for the entire year. Enter your date of birth (must be prior to 1957).

Line 2: A disabled veteran for the entire year. Enter the date disability began. A disabled veteran means a person who is a resident of Kansas and has been honorably discharged from active service in any branch of the armed forces of the United States or Kansas national guard and who has been certified by the United States Department of Veterans Affairs or its successor to have a 50% or greater permanent disability sustained through military action or accident or resulting from disease contracted while in such active service.

Line 3: The surviving spouse of a claimant who was either a disabled veteran or person 65 years of age or older for the entire year. Enter the date the claimant became a surviving spouse.

For the surviving spouse to qualify, the disabled veteran or person 65 years of age or old must have been receiving benefits pursuant to this act at the time of their death. If you are the surviving spouse of a disabled veteran, you must complete line 2.

HOUSEHOLD INCOME

Enter on lines 4 – 8 the annual income amounts received by you and your spouse during 2022. Enter on line 9 the income of ALL other persons who lived with you at any time during 2022.

Lines 4 and 5: Use the instructions for lines 4 and 5 of Form K-40H that begin on page 4 to complete lines 4 and 5 of Form K-40SVR.

Line 6: Enter in the first space the total Social Security and Supplemental Security Income (SSI) benefits received by you and your spouse. Include amounts deducted for Medicare, any Social Security death benefits, and any SSI payments not shown on the annual benefit statement. **Do not include Social Security or SSI “disability” payments.** (NOTE: Social Security disability or SSI payments become regular Social Security payments when a recipient reaches full retirement age. These Social Security disability payments, that were once Social Security disability or SSI payments, are NOT included in household income.) Enter the annual amount of any Social Security **disability** benefits and Social Security payments of a person who

has reached full retirement age who had previously been receiving Social Security disability payments, in the Excluded Income section on the back of Form K-40SVR enclose a benefit statement or award letter with your claim. If you do not have your statement of Social Security benefits, use the method given for line 6 of Form K-40H to compute your total received in 2022. Instructions are on page 4.

Lines 7 – 9: Use the instructions for lines 7 – 9 of Form K-40H on page 5 to complete these lines on Form K-40SVR.

Line 10: Add lines 4 – 9 and enter total. If the amount is negative, enter zero in the space provided. If more than \$50,000 you do not qualify for this property tax relief.

REFUND

Line 11: Enter the total 2022 general property tax you paid as shown on your real estate tax statement. Enter only **timely paid** tax amounts. For a list of items that you **cannot include** see the instructions for line 12 of Form K-40H on page 5.

If you are filing on behalf of a claimant who died during 2022, the property tax must be prorated based on the date of death. To determine the property tax amount to enter here, follow the instructions for deceased claimants on page 6.

Line 12: Enter the amount of general property taxes **paid timely** in your base year. “Base year” means the year in which an individual becomes an eligible claimant and who is also eligible for a claim for refund pursuant to this property tax relief claim. For an individual who would otherwise be an eligible claimant prior to 2021, such base year shall be deemed to be 2021 for the purposes of this property tax relief claim.

Line 13: PROPERTY TAX REFUND. (Subtract line 12 from line 11.)

EXCLUDED INCOME

Line 14: To speed the processing of your refund, list in items (a) through (g) all other income that you **did not include** on line 10. For more information on what to include here, see Excluded Income on page 6.

Line 15: List all persons who resided in your household at any time during 2022. Complete all requested information for each person. If more space is needed, enclose a separate sheet.

SIGNATURE

You, as the claimant, **MUST sign the claim.** See the instructions for *Signature* on page 6.

