TR-1040
2009

WEB

STATE OF NEW JERSEY
HOMESTEAD REBATE APPLICATION
(FOR TENANTS ONLY)

IMPORTANT! YOU MUST ENTER YOUR SSN (s).

For Privacy Act Notification, See Instructions

Your Social Security Number ___ - ___ - ____

Spouse's/CU Partner's Social Security Number ___ - ___ - ____

County/Municipality Code (See Table p. 55) ____

Last Name, First Name and Initial (Joint filers enter first name and initial of each - Enter spouse/CU partner last name ONLY if different)

Home Address (Number and Street, including apartment number or rural route)

City, Town, Post Office | **State** | **Zip Code**

Place label on form if all preprinted information is correct. Otherwise, print or type your name and address.

FILING STATUS

1. ☐ Single
2. ☐ Married/CU Couple, filing joint return
3. ☐ Married/CU Partner, filing separate return
4. ☐ Head of household
5. ☐ Qualifying widow(er)/Surviving CU Partner

NJ RESIDENCY STATUS

6. If you were a New Jersey resident for ONLY part of the taxable year, give the period of New Jersey residency: From MM/DD/YY To MM/DD/YY

DO NOT FILE FORM TR-1040 IF YOU WERE A HOMEOWNER ON OCTOBER 1, 2009 (See Instructions)

7. On October 1, 2009, I rented and occupied an apartment or other rental dwelling in New Jersey as my principal residence. ☐ Yes ☐ No If "No," STOP. You are not eligible for a rebate as a tenant and you should not file this application. See instruction page 52.

8. On December 31, 2009, I (and/or my spouse/CU partner) was a. ☐ Age 65 or older b. ☐ Blind or disabled c. ☐ Not 65 or blind or disabled Fill in only **one** oval. See instruction page 52.

9. Enter the GROSS INCOME you reported on Line 28, Form NJ-1040 or see instructions ..... 9 ___,___,___.__

10. If your filing status is MARRIED/CU PARTNER, FILING SEPARATE RETURN and you and your spouse/CU Partner MAINTAIN THE SAME PRINCIPAL RESIDENCE, enter the gross income reported on your spouse's/CU partner's return (Line 28, Form NJ-1040) and **fill in oval** → ☐ 10 ___,___,___.__

11. TOTAL GROSS INCOME (Add Line 9 and Line 10) ..... 11 ___,___,___.__

STOP - IF LINE 11 IS MORE THAN $100,000, YOU ARE NOT ELIGIBLE FOR A TENANT REBATE.

12. Enter the address of the rental property in **New Jersey** that was your principal residence on **October 1, 2009**.

Street Address (including apartment number) _____ Municipality _____

13. Enter the total rent you (and your spouse/CU partner) paid during 2009 for the rental property indicated at Line 12 ..... 13 ___,___,___.__

14. Enter the number of days during 2009 that you (and your spouse/CU partner) occupied the rental property indicated at Line 12. (If you lived there for all of 2009, enter 365)..... 14 ____

15. Did anyone, other than your spouse/CU partner, occupy and share rent with you for the rental property indicated at Line 12? Yes ☐ (If yes, you must complete Lines 15 a, b, and c) ☐ No

15a. Enter the total number of tenants (including yourself) who shared the rent during the period indicated at Line 14. (For this purpose, husband and wife/CU couple are considered one tenant). .. 15a ____

15b. Enter the name(s) and social security number(s) of all other tenants (other than your spouse/CU partner) who shared the rent.

Name _____ SS# ____/____/____

Name _____ SS# ____/____/____

Name _____ SS# ____/____/____

15c. Enter the total rent paid by all tenants during the period indicated at Line 14 ... 15c ___,___,___.__

SIGN HERE

Under the penalties of perjury, I declare that I have examined this rebate application, including accompanying documents, and to the best of my knowledge and belief, it is true, correct, and complete and that I occupied the rental property for which I am applying for the tenant homestead rebate as my principal residence on October 1, 2009. If prepared by a person other than taxpayer, this declaration is based on all information of which the preparer has any knowledge.

Your Signature _____ Date _____

Spouse's/CU Partner's Signature (if filing jointly, BOTH must sign) _____ Date _____

If you do not need forms mailed to you next year, fill in (See instruction page 14) ..... ☐

I authorize the Division of Taxation to discuss my rebate application and enclosures with my preparer (below) ☐

Paid Preparer's Signature | Federal Identification Number

Firm's Name | Federal Employer Identification Number

If you are ONLY filing Form TR-1040, mail your application to:

NJ Division of Taxation
Revenue Processing Center
PO Box 197
Trenton, NJ 08646-0197