

Poverty Exemption - 2025 CHECKLIST

Below is a checklist of items needed for the local
Board of Review to make an accurate decision about your
Application for poverty exemption.

Note: Provide proofs for yourself, spouse, and all **OTHERS** that are living in the home.

- ☐ Completed application for Poverty Exemption-**Form 5737** including the mandatory **Asset Test**.
- ☐ Completed Income Sources for each owner/occupant in the home 18 years or older (attached to application).
- ☐ Current 2024 State & Federal Income Tax Returns for each owner/occupant in the home 18 years or older, or Poverty Exemption affidavit, **Form 4988**.
- ☐ Most recent 3 months of Bank Statements for each owner/occupant in the home.
- ☐ Documentation for all income sources including but not limited to credits, claims, Social Security income, child support, alimony income, bridge cards, student loans, scholarships, grants, pension-1099 statements and all other income sources.
- ☐ Copy of Driver's License (front & back).
- ☐ Proof of ownership -must complete **Form 5739** Affirmation of Ownership and Occupancy-attach Copy of Deed.
- ☐ If applicable, a written explanation of why any person(s) in the home, 18 years of age or over, is not contributing to the income and expenses of the property.
- ☐ If applicable, a written explanation of why applicant's expenses exceed their income, excluding property taxes.
- ☐ If applicable, most recent home mortgage, second mortgage, equity loan statements.
- ☐ Unusual & excessive medical bills.