

Form OR-RMI
Reverse Mortgage Information Schedule

Page 1 of 3 • Use UPPERCASE letters. • Use blue or black ink. • Print actual size (100%). • Don't submit photocopies or use staples.

ONLY complete if you have a reverse mortgage and submit with your deferral application, Form OR-PTDA.

First name Initial

Last name

- 1. Are you reapplying to the Property Tax Senior and Disabled Deferral Program and were on the deferral program prior to 2011 with a reverse mortgage from before July 1, 2011? (Check only one)..... Yes No
- 2. Was your reverse mortgage established on or after July 1, 2011? (Check only one)..... Yes No

If you answered Yes to question 1 and No to question 2, go back to the application and complete the required information. No equity test is necessary.

If you answered Yes to question 2, and acquired a reverse mortgage on or after July 1, 2011 and before January 1, 2017, complete Section A below in addition to the application and include required supporting material noted below.

All other applicants with reverse mortgages, STOP here. You don't qualify for the Property Tax Deferral program.

Certain homes with reverse mortgages qualify for the Property Tax Senior and Disabled Deferral program [Oregon Revised Statutes (ORS) 311.700]. You may qualify for deferral if you opened a reverse mortgage on or after July 1, 2011 and before January 1, 2017, and currently have 40 percent or more equity in your home. The home value will be determined using the real market value from the last property tax statement and with applied indexing.

Part A-Required information

1. Starting date of current reverse mortgage..... 1. Date (MM/DD/YYYY) / /

2. Current reverse mortgage balance 2. , , . 0 0

3. Date of current reverse mortgage balance 3. Date (MM/DD/YYYY) / /

4. Current real market value (RMV), from your most recent property tax statement 4. , , . 0 0



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Part A-Required information: continued

5. List any additional lien(s) or judgments you may have against your home (list on additional page if needed):

Creditor name

5a.

Lien start date (MM/DD/YYYY)

 / /

Current balance

 , , .

Creditor name

5b.

Lien start date (MM/DD/YYYY)

 / /

Current balance

 , , .

Creditor name

5c.

Lien start date (MM/DD/YYYY)

 / /

Current balance

 , , . 

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Oregon Department of Revenue

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Part B—Mailing instructions and signature

Before mailing:

- Complete and sign your application.
- Complete all pages including the income and net worth worksheets.

Attach copies of the following:

- Include this form with your application.
- Provide your most recent reverse mortgage statement(s) or other listed statements of debts against the property showing the current balance.

We may need a title report. If we do, we will contact you.

Any information provided about the value of your homestead may be subject to review and may lead to changes to your property taxes.

Under penalty of false swearing, I declare that the information in this form and any enclosures are true, correct, and complete.

Signature

X

Date (MM/DD/YYYY)

/ /

