

Form OR-RMI

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Oregon Department of Revenue



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Office use only
Date received

Reverse Mortgage Information Schedule

Complete this form only if you have a reverse mortgage

Applicant first name Initial Last name

1. Are you reapplying to the deferral program, and had been on deferral 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, please 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, please 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 Senior and Disabled Deferral program (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 the applicable index factor. This does not enable retroactive deferral payments for prior tax years but enables deferral of upcoming taxes for properties that qualify.

Part A-Required information

1. Starting date of current reverse mortgage
2. Current reverse mortgage balance as of
3. Current assessor's real market value (RMV), from 2022-23 property tax statement
4. List any additional lien(s) or judgments you may have against your home (list on additional page if needed):
4A. Creditor name, Lien start date, Current balance
4B. Creditor name, Lien start date, Current balance
4C. Creditor name, Lien start date, Current balance

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## Part B—Mailing instructions and signature

### Before mailing your application, be sure to:

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

### Attach additional copies for eligibility (ORS 311.700):

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

**A title report may be required if necessary 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 is true, correct, and complete.**

<b>Sign here</b>	Signature  X	Date  / /
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