

KENAI PENINSULA BOROUGH

Kenai Peninsula Borough Assembly

144 North Binkley Street
Soldotna, AK 99669
Phone 907-714-2160
Fax 907-714-2388

Gary Knopp, Assembly President
Charlie Pierce, Vice President

MEMORANDUM

TO: Gary Knopp, Assembly President
Kenai Peninsula Borough Assembly Members

FROM: Mako Haggerty *J. B. for M. H.*

DATE: September 6, 2011

RE: Ordinance 2011-29, authorizing the assessor to accept late-filed senior citizen exemption applications for 2011

This ordinance was introduced on August 2, 2011, to request the assembly find good cause for waiving the deadline of two late-filed senior citizen exemption applications. After the ordinance was drafted it was brought to my attention that Kathleen Finn had missed the 2011 application deadline for a senior citizen exemption on her property, based on miscommunication with the borough regarding the application requirements. Ms. Finn would like the assembly to include her information for consideration and approval of a waiver of the 2011 application deadline. KPB 5.12.105(E) allows the assembly to waive the March 31st deadline by ordinance if the claimant is unable to comply. An inability to comply must be caused by a serious condition or extraordinary event beyond the taxpayer's control. Based on her request I offer the following amendments to Ordinance 2011-29.

➤ Amend the title as follows:

AN ORDINANCE AUTHORIZING THE ASSESSOR TO ACCEPT THE LATE-FILED SENIOR CITIZEN EXEMPTION APPLICATIONS OF KATHLEEN FINN, SHIRLEY A. BAILEY AND THEODORE J. FORSI, JR. FOR 2011

➤ Add a new sixth whereas as follows:

WHEREAS, the late-filed senior citizen exemption application of Kathleen Finn has been received for processing with a request for waiver of the 2011 application submission deadline;

- Amend section 1 as follows:

SECTION 1. Upon reviewing the applications and affidavits submitted with this ordinance, **pursuant to KPB 5.12.105(E)** the assembly finds good cause for waiving the March 31 deadline for filing the Senior Citizen Exemption applications set out in Section 2 below **and that the applicant in Section 3 below was unable to comply with the March 31 deadline.**

- Add a new section 3 as follows and renumber the existing sections 3 and 4 accordingly:

SECTION 3. **That the March 31st deadline for filing an application for the senior citizen real property exemption for the following parcel is hereby waived as the applicant was unable to comply with that deadline:**

<u>Senior Citizen Applicant</u>	<u>Parcel No.</u>	<u>Year</u>
<u>Kathleen Finn</u>	<u>169-190-14</u>	<u>2011</u>

July 24th 2011

Dear Mayor Carey and Assembly Members,

I am requesting that you approve my late petition for the "Senior Citizen Exemption", home owner tax deferral.

I am late in filing, for a reason that you will not find satisfactory at the outset, but I deeply hope you will consider approving my request at this time.

When I received my tax bills last year, as I turned 65, I called K.P.B. Tax Office to ask about the tax deferral for my home property. I was told that, at that time, I did not yet qualify, but when I turned 66, I would. So I waited until this year, fully expecting that I would not receive a tax notice for my home property. When this year's property tax notice came in again, I called the office and was told that I qualify but was too late for the "exemption" application this year. Had I been told last summer when I called in, that I needed to fill out paperwork in order to get the "exemption", I would have done so right then!!!

I understood this to be a senior benefit, not an "exemption" for which one needed to fill out application paperwork.

I have been a resident of Alaska, living and working here as a nurse, for 34 years. I have owned my current home in Anchor Point since 1992. Prior to that I lived in Bethel, Dillingham and Barrow (where I continued to work part-time for another several years). I decided, however, to spend the remainder of my working, and my retirement years, here on the Peninsula, and found this affordable home in Anchor Point 19 years ago.

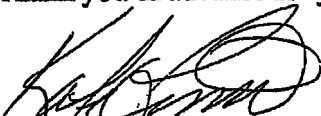
Please help me keep my home at an affordable level.

I understand that you will be reviewing other Senior Exemptions at your August 2nd meeting. PLEASE allow me to have this year's home property tax exemption approved.

I would love to be present at the Assembly meeting on the 2nd, but I have a prior commitment to be in Fairbanks on that day.

Finally: I appreciate your serious consideration of my request—as it certainly meets the intended spirit of this Senior Citizen Exemption rule.

Thank you in advance for you consideration.....and approval of my request.


Kate (Kathleen Ann) Finn

Physical address:
72190 Shannon Rd.
Anchor Point
Mailing address:
P.O. Box 3364
Homer 99603





SENIOR CITIZEN EXEMPTION (INCLUDING THE \$20,000 RESIDENTIAL EXEMPTION)

2011

DUE ON OR BEFORE FEBRUARY 15TH OF THE EXEMPTION YEAR
APPLICANTS MUST BE AGE 65 ON OR BEFORE DECEMBER 31 OF THE PRECEDING YEAR

VERIFICATION OF AGE MUST ACCOMPANY INITIAL FILING (PASSPORT OR BIRTH CERTIFICATE)

Return completed form and requested information to:

Kenai Peninsula Borough Assessor - 144 North Binkley - Soldotna, AK 99669
907-714-2230 or 1-800-478-4441 Fax 907-714-2393 - 714-2377
www.borough.kenai.ak.us/assessingdept

FINN KATHLEEN ANN
PO BOX 3364
HOMER AK 99603-3364

Assessor's Parcel Number: 169-190-14
Physical Address: 72190 SHANNON RD
Legal Description: T 5S R 15W SEC 3 Seward Meridian HM 0770016
BEAVER LODGE ESTATES SUB LOT 2 BLK 1

Home Phone: 235-5329	Applicant's date of birth: -	Spouses name: N/A
Cell Phone: N/A	Applicant's Social Security Number: -	Spouses date of birth: N/A
I am applying as a: <input type="checkbox"/> Senior age 65 and spouse <input checked="" type="checkbox"/> Individual age 65 or older <input type="checkbox"/> Surviving spouse age 60 or older		
Dwelling type: <input checked="" type="checkbox"/> Single Family <input type="checkbox"/> Condominium <input type="checkbox"/> Mobile Home <input type="checkbox"/> Multi-Family Dwelling <input type="checkbox"/> Other _____		
What percent of ownership do you alone (or jointly with your spouse) have in this property? 100%		
Is any portion of this property used for any Commercial Purposes? (No) Yes Rental Purposes? (No) Yes		
Is occupancy shared with someone other than your spouse and/or minor children? (No) Yes		
If yes, when did shared occupancy begin? Date N/A What percent of the home do they occupy? _____ %		
<i>If live in care is medically necessary, attach letter from the doctor.</i>		
Do you or your spouse own property in another state? (No) Yes Do you receive any exemptions on that property? (No) Yes		
When traveling outside the state of Alaska, at what address do you primarily reside? N/A		
Did you receive a 2010 Alaska Permanent Fund Dividend? No (Yes)		
Will you qualify for a 2011 Alaska Permanent Fund Dividend? No (Yes) Will you or have you applied? No (Yes)		
If you answered "No" to any of the PFD questions, you must also complete KPB Supplemental Form #1 (available at the Assessing Department or online).		

I CERTIFY: This property is my primary residence and permanent place of abode. I will occupy it for a minimum of 185 days prior to each year in which I receive exemption. The property is not used for non residential, temporary or vacation purposes, and is my true and fixed permanent residence. I hereby certify that the information I am supplying on and with this form is TRUE and CORRECT to the best of my knowledge. I understand that willful misrepresentation is punishable by (1) forfeiture of the exemption for that year, and (2) imposition of a civil fine of up to \$1,000 for each violation; and (3) loss of eligibility to receive the next five years' exemptions.

KATHLEEN ANN FINN *Kathleen Finn* **7-24-11**
 PRINT OR TYPE OWNER NAME SIGNATURE DATE

****ASSESSOR'S USE ONLY****

New Filing Occupancy Age Denied Approved Entered by: _____
 Prior Filing Ownership **(2011)** Perm Fund Full Variable Contig _____

AFFIDAVIT OF KATHLEEN ANN FINN
 (Senior Citizen or Disabled Veteran Name)
 AND APPLICATION FOR APPROVAL OF LATE FILING
 FOR SENIOR CITIZEN AND/OR DISABLED VETERAN

This Application is made Pursuant to A.S. 29.45.030 Required Exemptions and KPB Code 5.12.105. Real Property Tax-Exemptions - Senior Citizens, Disabled Veterans and surviving spouses thereof.

Failure to meet the filing deadline is based on the following reason(s):

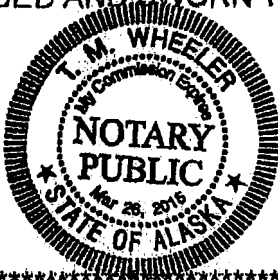
Please see attached note

FURTHER AFFIANT SAITH NAUGHT.

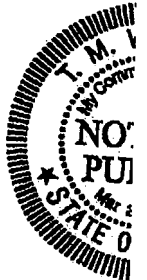
Dated at Homer, Alaska, this 25th day of July, 2011.

[Signature]
 (Senior Citizen and/or Disabled Veteran Signature)

SUBSCRIBED AND SWORN TO before me this 2th day of July, 2011.



[Signature]
 Notary Public, State of Alaska
 My Commission Expires: March 26, 2015



(Exemption applications submitted for consideration for late-file acceptance will be forwarded to the Assembly from the Mayor's Office).

ASSEMBLY ACTION: APPROVAL _____ DENIAL _____