



TESTMELXXXXX A TESTWATERSXXXXXXXXXX TEST 234007890
1234 TESTJEFFERSON STREETXXXXXXXXXX
TESTINOFOTTOOPPEEKAAA KS 66612-1234 SN 7855551212

Claimant died during 2023 - Date of death 05152023 Name or address has changed? Filing an amended claim

NOTE: If you filed a K-40H or K-40PT for 2023, you DO NOT qualify for this refund.

Qualifications - To qualify for this property tax refund you must have been a resident of Kansas all of 2023 and owned and occupied the same homestead in both 2023 and the base year. Answer only the question(s) that apply to you.

- 1. Age **65** or over for the entire base year? Enter your date of birth (must be prior to 1958). 01151957
- 2. Disabled veteran for the entire base year and claim year? Enter the date the disability began. 07151979
ENCLOSE your Veterans Affairs Award Letter showing disability rating.

3. Mark this box if you are filing as a surviving spouse of a disabled veteran or person 65 years of age or older who has previously received benefits from the SVR program at the time of their death and provide the deceased claimant's name, SSN, and date of death in the spaces provided. See instructions for this qualification and for the required enclosures.

Name of deceased claimant	SSN of deceased claimant	Date of death of deceased claimant
TESTMELXXXXX A TESTWATERSXXXXXXXXXX	234007890	05152022

- 4. 2023 Wages OR KAGI \$ 87533 plus Federal Earned Income Credit \$ 10000 . Enter the total. 60789
(If amount(s) are a negative, enter zero.)
- 5. All taxable income other than wages and pensions not included in line 4. (Do not subtract net operating and capital losses.) 70212
- 6. Total Social Security and SSI benefits, including Medicare deductions, received in 2023 (do not include disability payments from Social Security or SSI). \$ 10000 , enter 50% of this total. 80123
- 7. Railroad Retirement benefits and all other pensions, annuities, and veterans benefits. (Do not include disability payments from Veterans and Railroad Retirement.) 90789
- 8. TAF payments, general assistance, worker's compensation, grants and scholarships. 10212
- 9. All other income, including income of others who resided with you at any time during 2023. 11123
- 10. **TOTAL HOUSEHOLD INCOME.** (Add lines 4 – 9. If line 10 is more than \$53,600, you do not qualify for a refund.) 12789
- 11. 2023 general property taxes (excluding specials). 1323
Mark this box if you have delinquent property tax
- 12. Record base year, 2023 ; homestead's appraised value in the base year \$ 350000 and general property taxes (excluding specials) paid for the base year 1489
- 13. **PROPERTY TAX REFUND.** (Subtract line 12 from line 11). 1523

Check if you wish to participate in the Refund Advancement Program.

I authorize the Director of Taxation or the Director's designee to discuss my K-40SVR and enclosure with my preparer.
I declare under the penalties of perjury that to the best of my knowledge and belief this is a true, correct, and complete return.

IMPORTANT: Please allow 20 to 24 weeks to process your refund.

Claimant's Signature (Required) _____ Date _____

Preparer Signature (Required) _____ Preparer Phone Number _____

Preparer PTIN, EIN, or SSN (Required) P03465080

2023
KANSAS PROPERTY TAX RELIEF CLAIM
for SENIORS and DISABLED VETERANS

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K-40SVR
Page 2
137123



TESTMELXXXXX A TESTWATERSXXXXXXXXXXXX

TEST

234007890

Excluded Income:

Providing this information should speed up the processing of your claim. Income reported here should not be included on line 10 of this form.

14. Enter in the spaces provided the annual amount of all other income not included as household income on line 10:

(a) Food stamps	98714	(b) Nongovernmental Gifts	98717
(c) Child support	98715	(d) Settlements (lump sum)	98718
(e) Personal and Student Loans	98716	(f) SSI, Social Security, Veterans or Railroad Disability	98719
(g) Other: Source _____		Amount	98720

Members of Household:

15. List the names of ALL persons who resided in your household at any time during 2023. Specify the number of months they lived with you and report their portion of income that is included in the total household income on line 10. Enclose additional sheets if needed and only after completing the 15 lines below.

Name	# of Months	Portion of income that is included on line 10	SSN
TESTTIBERIOUS J TESTERSAMPLEPERSONS	12	13212	123456781
MAREGOLD M TESTERSAMPLEPERSONS	12	23212	234567892
JOSEPH J TESTERSAMPLEPERSONS	12	33212	345678903
XX	00	00000	000000004
XX	00	00000	000000005
XX	00	00000	000000006
XX	00	00000	000000007
XX	00	00000	000000008
XX	00	00000	000000009
XX	00	00000	000000010
XX	00	00000	000000011
XX	00	00000	000000012
XX	00	00000	000000013
XX	00	00000	000000014
XX	00	00000	000000015



K-40SVR LINE-BY-LINE INSTRUCTIONS

If you filed a Form K-40H or K-40PT for 2023, you cannot claim this refund.

NAME AND ADDRESS

Use the instructions for Form K-40H on page 4 to complete the personal information at the top of Form K-40SVR.

QUALIFICATIONS

Line 1: Age 65 or over for the entire base year. Enter your date of birth (must be prior to 1958). "Base year" means the first year an individual is 1) age 65 or over and/or a disabled veteran for the entire year, 2) owns and occupies the homestead where the claimant is seeking a refund for the entire year, and 3) is a resident of Kansas for the entire year. The appraised value of the claimant's homestead for the base year cannot be more than \$350,000.

Line 2: A disabled veteran for the entire base year. Enter the date disability began. A disabled veteran means a person who is a resident of Kansas and has been honorably discharged from active service in any branch of the armed forces of the United States or Kansas National Guard and who has been certified by the United States Department of Veterans Affairs or its successor to have a 50% or greater permanent disability sustained through military action or accident or resulting from disease contracted while in such active service.

Line 3: Check the box if you are the surviving spouse of a claimant who was either a disabled veteran or person 65 years of age or older for the entire year.

For the surviving spouse to qualify, the disabled veteran or person 65 years of age or older must have been receiving benefits under the SVR program (K.S.A. 79-4508a) at the time of their death. If you are claiming the benefit as a surviving spouse, list the deceased claimant's name, SSN, and date of death. If claiming the benefit as the surviving spouse of a disabled veteran, also complete Line 2 of this claim (date disability began).

Enclose with your K-40SVR a copy of the original veterans Disability Determination letter or letter from your regional V.A. that includes the disability date and the percentage of permanent disability being 50% or greater.

HOUSEHOLD INCOME

Enter on lines 4 through 8 the annual income amounts received by you and your spouse during 2023. Enter on line 9 the income of ALL other persons who lived with you at any time during 2023.

Lines 4 and 5: Use the instructions for lines 4 and 5 of Form K-40H that begin on page 4 to complete lines 4 and 5 of Form K-40SVR.

Line 6: Enter in the first space the total Social Security and Supplemental Security Income (SSI) benefits received by you and your spouse. Include amounts deducted for Medicare, any Social Security death benefits, and any SSI payments not shown on the annual benefit statement. **Do not include Social Security or SSI "disability" payments.** (NOTE: Social Security disability or SSI payments become regular Social Security payments when a recipient reaches full retirement age. These Social Security disability payments, that were once Social Security disability or SSI payments, are NOT included in household income.) Enter the annual been receiving Social Security disability payments, in the Excluded Income section on the back of Form K-40SVR. Enclose a benefit statement or award letter with your claim.

amount of any Social Security **disability** benefits and Social Security payments of a person who has reached full retirement age who had previously been receiving Social Security disability payments, in the Excluded Income section on the back of Form K-40SVR. Enclose a benefit statement or award letter with your claim.

If you do not have your statement of Social Security benefits, use the method given for line 6 of Form K-40H to compute your total received in 2023. Instructions are on page 4.

Lines 7 through 9: Use the instructions for lines 7 through 9 of Form K-40H on page 5 to complete these lines on Form K-40SVR.

Line 10: Add lines 4 through 9 and enter total. If the amount is negative, enter zero in the space provided. If more than \$53,600 you do not qualify for this property tax relief.

REFUND

Line 11: Enter the total 2023 general property tax you have paid or will pay, as shown on your real estate tax statement. Do not include special assessments taxes, such as those levied for streets, sewers, or utilities; charges for services, such as sewer services, interest or late charges; or taxes on agricultural commercial land. NOTE: the 2023 property tax is payable in two installments - the first is due December 20, 2023 and the second is due May 10, 2024. Enter the total of both installments (whether paid or not) on line 11.

If you are filing on behalf of a claimant who died during 2023, the property tax must be prorated based on the date of death. To determine the property tax amount to enter here, follow the instructions for deceased claimants on page 6. (A surviving spouse claim will not be prorated.)

If you have delinquent property tax, mark the box on line 11. Your entire homestead refund will be sent to your county treasurer to pay the delinquent property tax.

Line 12: Enter the amount of general property taxes paid by you in the base year. "Base year" means the first year an individual is 1) age 65 or over and/or a disabled veteran for the entire year, 2) owns and occupies the homestead where the claimant is seeking a refund for the entire year, and 3) is a resident of Kansas for the entire year. The appraised value of the claimant's homestead for the base year cannot be more than \$350,000. For an individual who would otherwise be an eligible claimant prior to 2021, such base year shall be deemed to be 2021 for the purposes of this property tax relief claim.

Line 13: PROPERTY TAX REFUND. Subtract line 12 from line 11. This is your property tax refund.

EXCLUDED INCOME

Line 14: To speed the processing of your refund, list in items (a) through (g) all other income that you **did not include** on line 10. For more information on what to include here, see *Excluded Income* on page 6.

Line 15: List all persons who resided in your household at any time during 2023. Complete all requested information for each person. If more space is needed, enclose a separate sheet.

SIGNATURE

You, as the claimant, **MUST sign the claim.** See the instructions for *Signature* on page 6.