



| | |
|---|-------------------|
| Primary Account | Social Security # |
| Secondary Account | Social Security # |
| Total amount of Estimated Tax payment & Tax Year that payments are to be transferred from | |
| *\$ | Tax Year |

Application of Allocated Funds

| Name | Social Security # | Amount to be applied | Apply to Tax Year |
|-------------------------------------|-------------------|----------------------|-------------------|
| Date of Move | | | |
| Street Address (include Apt#/Suite) | | | |
| City, State & Zip Code | | | |
| | | | |
| Date of Move | | | |
| Street Address (include Apt#/Suite) | | | |
| City, State & Zip Code | | | |
| Total \$ | | | |
| *must equal above total | | | |

| | |
|----------------------------|------|
| Signature of Primary Filer | Date |
|----------------------------|------|

Phone # _____

| | |
|------------------------------|------|
| Signature of Secondary Filer | Date |
|------------------------------|------|

Phone # _____

Note: Form must be signed and dated by both parties to be valid

Allocation Form

Joint estimated tax payments. If two individual taxpayers have joint estimated tax payments and credits for the current tax year but are filing separate municipal tax returns, a “Request for Allocation of Payments Form” will allow you to divide the estimated tax payments and credits as agreed upon by each taxpayer.

Estimated payments and credits can be divided in proportion to each taxpayer’s municipal individual tax as shown on the separate returns for the respective tax year. Or you may attach a separate explanation of how the payments were divided between the taxpayers and attach to the Allocation Form.

Unless an Allocation Form is completed and signed by both taxpayers, all estimated payments and credits for that tax year will be allocated to the primary taxpayer, which is the first account number listed on the joint account.

Form Instructions

Request for Allocation of Payments

Enter the primary account number and social security number

Enter the secondary account number and social security number (if payments will be distributed from a joint account)

Enter the total amount of the estimated payments and credits from the primary account

Enter the tax year that you are re-allocating the payments and credits

Application of Allocated Funds

Enter the name, social security number, the amount to be applied to this taxpayer and the year the payments\credits should be applied

If the taxpayer has moved, indicate the date they have moved

Enter the current mailing address

The new amount of estimated payments and credits allocated to each taxpayer must equal the total amount of estimated payments and credits in the joint account for the specific year.

Both parties must sign and date the form to be valid