



Credit Union Moneys and Credits Tax Statement to Assessor / Confidential Report

Iowa Code Section 533.329

This form must be filed with your city or county assessor on or before June 1.
Assessor addresses can be found at the [Iowa State Association of Assessors Web site](#).

Applicant Contact Information	
<small>PLEASE PRINT</small>	
Name: _____	
Phone Number: _____	eMail: _____

December 31, 20_____

Name of Credit Union: _____

Address: _____ City, State, Zip: _____

SCHEDULE A - LEGAL RESERVES (See 533.303)

Balance of Legal Reserve Account:	\$ _____
Less Excess Reserves (attach calculation)	\$ _____
Required Legal Reserve Balance	\$ _____

SCHEDULE B - SPECIAL RESERVES (See 533.303)

Total Special Reserves: \$ _____

SUM TOTAL OF LEGAL AND SPECIAL RESERVES:	\$ _____
LESS STATUTORY EXEMPTION:	\$ 40,000.00
AMOUNT SUBJECT TO TAX:	\$ _____
MULTIPLY BY FIVE MILL LEVY TAX RATE:	0.005
CALCULATED TAX:	\$ _____
TAX CREDIT APPLIED (Attach IA Tax Form 148, if applicable)*:	\$ _____
TAX PAYABLE:	\$ _____

I, _____ do testify that this is a true and complete statement in accordance with sections 533.303 and 533.329 of the Code of Iowa, by:

Signature: _____ Title: _____

(Name and Title)

Credit Union: _____ Date: _____

Notarized by: _____ Date: _____

Date Notary Expires: _____ State: _____

* Applicable Tax Credits: See section 533.329 for a listing of applicable tax credits.