

REQUIRED DOCUMENTATION FOR 467 SENIOR CITIZENS EXEMPTION

PROOF OF AGE: Birth certificate, Valid (current) driver's license, a statement from the Social Security Administration.

If you do not have the foregoing documents, please contact the Town Assessor for further instructions.

Once you have verified your age with the Town Assessor, you need not re-submit proof of age with subsequent exemption applications.

VERIFICATION OF INCOME (Required on ALL applications)

A COMPLETE COPY OF YOUR 2023 FEDERAL INCOME TAX RETURN OR 467-SENIOR INCOME WORKSHEET, SIGNED AND DATED ALONG WITH

TYPE OF INCOME

VERIFICATION REQUIRED

Social Security

A copy of the statement of payments (Form SSA 1099) to you for the preceding calendar year,

OR

A copy of your most recent social security check.

Wages

A copy of your W-2 form.

Bank Interest or Dividends
nontaxable interest
from State & Local Bonds)

A copy of the previous year's (Include (income tax year) interest/ dividend statements (1099) for EACH account.

Pension & Compensation

A copy of the statement of earnings for the prior year (income tax year) from the issuing agency.

OR

A copy of your most recent check.

Rents	A signed statement from the <u>TENANT</u> stating the gross rent paid to you during the preceding calendar year.
Annuity or I.R.A.	A statement of INTEREST earned. The principle amount would be the return of capital and is not included as part of your income.
Other Income	Where relatives or friends reside with the senior citizen applicant, or contribute to the applicant's support, a signed statement indicating contributed amount to the applicant in the prior calendar year.

If you are not required to file an Income Tax Return, please complete the 467-Senior-WKST (enclosed).

THIS OFFICE CANNOT ACCEPT INCOMPLETE APPLICATIONS. IF ANY DATA IS MISSING, THE ENTIRE APPLICATION WILL BE RETURNED FOR COMPLETION.

ALL EXEMPTION APPLICATIONS MUST BE FILED BY TAXABLE STATUS DATE, MAY 1. WE ASK THAT YOU PRESENT YOUR COMPLETED APPLICATION TO THIS OFFICE BY APRIL 30, 2024 (NO LATER THAN MAY 1, 2024). THIS WILL ASSIST OUR OFFICE IN THE TIMELY PROCESSING OF YOUR APPLICATION. FURTHER, THIS SCHEDULE ALSO ALLOWS US TO RESOLVE ANY PROBLEMS WHICH MIGHT ARISE IN THE APPLICATION PROCESS AND HAVE THEM RECONCILED BY TAXABLE STATUS DATE.

If you have any questions regarding the application procedure, please contact the Assessor's office Monday through Friday, 8:00 AM to 4:00 PM. (914) 962-5722 Ext. 227.