

Town of Irondequoit
 RP-467 Senior Citizen Exemption Forms
 School Tax Bill **2019-2020**/ Town & County Bill **2020**







Dear Property Owner(s):

New for 2019!! The RP-467-E Senior citizen exemption must be accompanied by an RP-425 Enhanced Star application. Please complete and submit all forms included to qualify for this exemption. Please submit:

- Your 2017 Income
- RP-425-E
- RP-425-IVP
- ** • RP-425-Wkst

**If you do not file income tax, you will also need to fill out the RP-425-Wkst, Income for Star Purposes Worksheet.

Complete the application, making sure to...

1.  Have **all** resident owners sign and date the application.
2.  Enclose a copy of your **ENTIRE 2017 Federal Income Tax Return**, including all **schedules** filed with your return.
3.  Include a copy of your **2017 Social Security** benefit statement. SSA-1099.
4.  Include copies of all 1099 forms for W2's, taxable interest, IRA, pension, 401K, annuity distributions.
5.  Include all non-taxable income not listed on your tax return. Ie: Veteran benefits, worker's compensation, disability, dividends, capital gains, rollover, etc.
6.  Provide a copy of your 2017 IRA End of Year Income Summary-ALL Pages, Snapshot or Portfolio and Yearly Statements for all IRA accounts (including Roth) that you hold with or without distributions and Anniversary statements for Annuities. Under Real Property Tax Law, it has been determined that the **earnings (including INTEREST, DIVIDENDS AND CAPITAL GAINS)** on IRA and all retirement accounts should be considered income for this exemption.

**The completed application and all documentation
 must be received in our Assessor's office
 by **March 1, 2019.****

If you, or your spouse, own property in another state that you are claiming as your full-time residence, please provide our office with documentation showing the address of the property.

Assessor's Office Phone/Hours: 585-336-6055: Monday - Friday from 8:30am to 4:30pm



Please refer to the list provided to support and review income requirements for qualification:

Please note all statements are required for 2017 income
(With or Without tax returns)

Income to be included:

- Salary or Wages (W-2), including bonuses
- All Social Security payments (Form SSA 1099)
- Retirement/Pension (Form 1099)
- VA Benefits including Disability Payments
- IRA earnings even if you are no currently taking distributions (End of year statements, Snapshot or Portfolio)
- Interest-bearing Savings Account
- Interest-bearing Checking Account
- Investment Dividends or Interest **including** non- taxable bonds
- Capital gains from sale or exchange of investments
- Self-Employment NET Income (show income and expenses)
- Rental Income and Expenses (including room and board, or other contributions from family members sharing expenses of the dwelling)
- Income from Estates or Trusts
- Annuity Payments (excluding amounts representing a return of capital)
- Alimony or Support Payments
- Unemployment Insurance Payments
- Worker's Compensation
- Lottery/Gambling Winnings