












Town of Irondequoit
RP-467 Senior Citizen Exemption Forms
School Tax Bill **2022-2023**/ Town & County Bill **2023**

Dear Property Owner(s):

Complete the forms required, making sure to...

1.  Have **all** resident owners sign and date the application.
2.  Provide a copy of your driver's license to prove residency.
3.  Enclose a copy of your **ENTIRE 2020 Federal Income Tax Return**, including all **schedules** filed with your return.
4.  Include a copy of your **2020 Social Security** benefit statement. SSA-1099.
5.  Include copies of all 1099 forms for W2's, taxable interest, IRA, pension, 401K and annuity distributions.
6.  Include all non-taxable income not listed on your tax return. Ie: Veteran benefits, worker's compensation, disability, dividends, capital gains, rollover, etc.
7.  Provide a copy of your 2020 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 forms and all supporting documentation must
be received in our Assessor's office
by **March 1, 2022.****

-  **Return your application early to assure your application & documentation is complete by March 1, 2022.**
-  **We will only accept your application with ALL of the required paperwork.**
-  **THIS EXEMPTION MUST BE RENEWED ANNUALLY**
-  **OWNERS who are over 65 and with GROSS INCOME of \$37,400 or less including Social Security may qualify for this exemption.**

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

** You are responsible to bring your own copies. If you can't, a fee will be charged for copies.



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

**Please note all statements are required for 2020 income
(With or Without tax returns)**

Do NOT mail in originals – only mail in copies

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