

TAX RELIEF PROGRAM FOR ELDERLY HOMEOWNERS & TOTALLY DISABLED

BASIC INFORMATION & REQUIREMENTS

BASIC REQUIREMENTS:

1. Owner (*or* spouse, if domiciled together) must have been 65 years of age by end of 2017.
2. Claimant must ***own and reside*** at the property for which relief is sought; or must hold a tenancy for life use, stipulated by deed, which makes him/her liable for the payment of property taxes. The assessment date is October 1, 2017.
3. Be a Connecticut resident; in addition the property must be your principal residence. Principal residence shall be defined as residency of at least 6 months and one day for the program year.
4. Income must be below **\$43,000** (married) or **\$35,300** (single or widowed). Qualifying income is defined as gross income, **plus Social Security** & tax-exempt interest & pensions. **(Veteran's pensions & Disability payments must be included)**.

FILING PERIOD: FEBRUARY 1 – MAY 15, 2018 PLACE: ASSESSOR'S OFFICE

WHAT TO BRING:

1. Social Security 1099 Form for income tax year 2017.
2. Federal Tax Return (1040) for 2017. ***If you do not file a return***, bring all 1099's showing income for 2017.
3. For example; Interest Income, Dividends, annuities, pensions (including veteran's), alimony, lottery winnings, IRA's, disability payments etc.

In addition to the State Homeowner Program, the town has a Tax Relief Program. This provides up to a \$225 tax benefit depending on % of ownership of the property. This application is filled out at the same time as well as the form for the Additional Veteran's & Local Option Exemption if applicable.

Any questions, please call our office at (860) 444-5820 or email us at assessor@waterfordct.org.