



# 2018-2019 Senior Citizens' Property Tax Exemption Application

**(Nassau County does not charge a fee to file this application.)**

*Any alteration of this application may result in a denial.*

### Property Address

House Number & Street: \_\_\_\_\_ Apt. Number: \_\_\_\_\_

City: \_\_\_\_\_ State: \_\_\_\_\_ Zip Code: \_\_\_\_\_

**Property Identification** SECTION \_\_\_\_\_ BLOCK \_\_\_\_\_ LOT \_\_\_\_\_ CA # or BLDG. # \_\_\_\_\_ TAX UNIT # \_\_\_\_\_  
For Condos & Co-ops only

### Ownership

Names of ALL Owners (as recorded on Deed/Certificate of Shares)	Date of Birth	Marital Status	Social Security Number

**Telephone Number:** Day (     ) \_\_\_\_\_ Evening (     ) \_\_\_\_\_

### Proof of Ownership (Indicate ALL documents that apply and attach with this application. Co-op owners must provide the CERTIFICATE OF SHARES.)

Latest recorded Deed – Liber/Deed# \_\_\_\_\_ Page# \_\_\_\_\_  Other: \_\_\_\_\_

Probated Will(s) of deceased owner(s)  Entire Trust (If property is in a Trust)

**NOTE:** If any owner appearing on any proof of ownership **or** the spouse of any owner is deceased, a Death Certificate must be attached to this application.

### Proof of Age (Indicate documents submitted for ALL owners)

Birth Certificate  Driver's License  Passport  Naturalization Papers  Other: \_\_\_\_\_

### Proof of Residency (Indicate documents submitted for ALL owners)

2016 SSA-1099  NYS Car Registration  2016 NYS Resident Income Tax Return

a. Do all owners presently reside on the property to be exempted?  Yes  No

b. Is an owner absent from the residence due to divorce, legal separation or abandonment?  Yes  No

Please Explain: \_\_\_\_\_

c. Is an owner receiving medical care as an inpatient in a health care facility?  Yes Date admitted: \_\_\_\_\_  No

\*\*\* If you checked "YES", you must submit a letter from the facility showing the date of admission and the cost incurred.

### List the address(es) of all additional real estate that you own, either entirely or in part. (Attach additional sheets, if necessary)

\_\_\_\_\_  
\_\_\_\_\_

NAME(S) of ALL adults & children <small>(including tenants)</small> living in Household	AGE	Dollar Amount of Rent/Contribution to Household Per MONTH

**Does a child (or children), including those of tenants, reside on the property and attend a public school in Grades Pre-K to 12?**  Yes  No (If children attend school, a letter from the school is required verifying student's enrollment.)

### **CERTIFICATION** (All Owners Must Sign\*)

I (We) certify that all of the above information made on this application is true and correct and that the property listed above is my (our) legal primary residence. I (We) understand it is my (our) obligation to provide any documentation of eligibility that is requested and to notify the assessor if I (we) relocate to another primary residence. I (We) understand that any willfully false statements of fact will be grounds for disqualification from further exemption for a period of five years and a fine as set forth in New York State Real Property Tax Law #467.

Signature of Owner 1 \_\_\_\_\_ Date \_\_\_\_\_ Signature of Owner 2 \_\_\_\_\_ Date \_\_\_\_\_

*\* If signed by an Attorney-in-fact, a PHOTOCOPY of the Power of Attorney must be included with this application. \**

**To qualify for this exemption, seniors must be 65 years of age or older in the year the exemption takes effect and meet certain income and residency requirements. In the case of siblings or husband and wife, only one owner must be 65.**

## STATEMENT OF INCOME

**Your entire 2016 FEDERAL and STATE Income Tax Returns (with schedules) MUST be attached to this application.**

**If you were not required to file an Income Tax Return, verification of all taxable and non-taxable income must be submitted. You may be required to submit an IRS printout of all Income Statements.**

**IMPORTANT - YOU MUST PROVIDE AND ATTACH FINANCIAL DOCUMENTATION FOR ANY AMOUNTS ENTERED IN THIS SECTION WITH THE APPLICATION.**

SOURCES OF 2016 INCOME FROM ALL OWNERS & OWNER'S SPOUSE	AMOUNT
Gross Social Security <i>(Complete copy of SSA-1099)</i>	
VA Disability Pension(s) or Surviving Spouse Disability Pension <i>(Amount listed in Award Letter)</i>	
Salary or Wages <i>(W-2's including Self-Employment)</i>	
IRA Earnings <i>(Interest/ Dividends earned) DO NOT include the amount of your distribution.</i>	
Capital Gains <i>(Include tax-deferred distribution statements from financial institutions)</i>	
Pensions, Annuities & Retirement Plans <i>(1099-R statements and include taxable &amp; non-taxable pensions)</i>	
Taxable & Non-Taxable Interest/Dividends <i>(All 1099-INT, 1099-DIV and Year-End Statements)</i>	
Disability/Worker's Compensation/Unemployment	
Income from Estates or Trusts <i>(Estate or Trust's Income Tax Return)</i>	
Business Income <i>(Schedule C, S-Corporation Tax Return with K-1 or Partnership Tax Return)</i>	
Rental Income <i>(Received from all properties)</i>	
Other Sources of Income <i>(Alimony, Child Support or money from others living in the house toward expenses)</i>	
<b>TOTAL OF ALL INCOME</b>	<b>\$</b>

Nassau County currently allows a deduction for **UN-REIMBURSED** medical and prescription drug expenses.

**\* ALL SUPPORTING DOCUMENTS, AS LISTED BELOW, MUST BE ATTACHED OR THE AMOUNTS ENTERED BELOW WILL NOT BE DEDUCTED. \***

**\* CANCELLED CHECKS WILL NOT BE ACCEPTED AS PROOF OF UN-REIMBURSED EXPENSES. \***

PLEASE CHECK BOX AND ATTACH COPIES OF ANY PAYMENTS MADE IN 2016	AMOUNT
<input type="checkbox"/> <b>Printout</b> from the Doctor's/Dentist's office of ALL Payments and Co-Payments	
<input type="checkbox"/> <b>Statement of Medicare Premium</b> or <b>Receipt for payment of Private Health Insurance Premiums</b>	
<input type="checkbox"/> <b>Printout</b> of payments from the Pharmacy and/or Out-of-Pocket Eye/Eyeglass Expenses	
<input type="checkbox"/> <b>Letter</b> from Health Care Facility stating date of admission, discharge and un-reimbursed expenses for owner's care	
<b>TOTAL UN-REIMBURSED EXPENSES</b>	<b>\$</b>

### FOR ASSESSOR'S USE ONLY

- Ownership received
- Age received
- Residency received
- Income received

<b>Gross Income</b>	
<b>Un-Reimbursed Medical Deduction</b>	-
<b>VA Disability Deduction</b>	-
<b>PARTIAL TAX EXEMPTION NET INCOME</b>	<b>\$</b>

DATE: \_\_\_\_\_  APPROVED  DENIED

Assessor's Signature/Stamp: \_\_\_\_\_

COMMENTS:

*Para asistencia en Español llame al (516) 571-2020*

**NASSAU COUNTY DEPARTMENT OF ASSESSMENT**

240 Old Country Road, 4<sup>th</sup> Floor, Mineola, New York 11501 - (516) 571-1500