



2020-2021 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: Home () _____ Cell () _____

E-Mail Address: _____

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)

2018 SSA-1099 NYS Car Registration 2018 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 explanation of abandonment? Yes No

(Please provide a copy of your Divorce Decree, Separation Agreement or Notarized Explanation of Abandonment with this application.)

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

**COPIES of your entire 2018 FEDERAL and STATE Income Tax Returns (with schedules)
MUST be attached to this application.**

Even if you do not file a Federal Income Tax Return, you will be required to submit an IRS printout of your Wage and Income Statement to verify all taxable and non-taxable income.

Internal Revenue Service Transcript Order Line: 1-800-908-9946

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

SOURCES OF 2018 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)</i> DO NOT include the amount of your distribution.	
Capital Gains <i>(Include tax-deferred distribution statements from financial institutions)</i>	
Pensions, Annuities & Retirement Plans <i>(1099-R statements and include taxable & 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> <i>* You must provide a copy of your Divorce Decree and/or Separation Agreement with this application.</i>	
TOTAL OF ALL INCOME	\$

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 2018	AMOUNT
<input type="checkbox"/> Printout from the Doctor's/Dentist's office of ALL Payments and Co-Payments	
<input type="checkbox"/> Statement of Medicare Premium or Receipt for payment of Private Health Insurance Premiums	
<input type="checkbox"/> Printout of payments from the Pharmacy and/or Out-of-Pocket Eye/Eyeglass Expenses	
<input type="checkbox"/> Letter from Health Care Facility stating date of admission, discharge and un-reimbursed expenses for owner's care	
TOTAL UN-REIMBURSED EXPENSES	\$

FOR ASSESSOR'S USE ONLY

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

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

DATE: _____ APPROVED DENIED

Assessor's Signature/Stamp: _____

COMMENTS:

To apply for the Senior Citizens' Property Tax Exemption for the 2020-2021 property tax year, you must file Form RPTL- 467 with the Nassau County Department of Assessment by the taxable status deadline – January 2, 2020.

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

NASSAU COUNTY DEPARTMENT OF ASSESSMENT

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