

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. Only one owner must be 65. The combined household income for 2019 cannot exceed \$37,399.

STATEMENT OF INCOME

**COPIES of your entire 2019 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, Option 8 (Request Form 4506-T)

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

SOURCES OF 2019 INCOME FROM ALL OWNERS & OWNER'S SPOUSE	AMOUNT
Gross Social Security <i>(Complete copy of SSA-1099 showing name and address)</i>	
VA Disability Pension(s) or Surviving Spouse Disability Pension <i>(Award Letter)</i>	
Salary or Wages <i>(W-2's including Self-Employment)</i>	
IRA Earnings <i>(1099-R, Letter from financial institutions showing 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 & 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 <i>(1099-G or Award Letter)</i>	
Income from Estates or Trusts <i>(Income Tax Return)</i>	
Business Income <i>(Schedule C or C-EZ, S-Corporation Tax Return with K-1 or Partnership Tax Return, Receipts for all deductions)</i>	
Rental Income <i>(Schedule E, Rent Received from all properties, Receipts for all deductions)</i>	
Other Sources of Income <i>(Alimony/Child Support, money from others living in the house toward expenses and Gambling)</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 2019	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 2021-2022 property tax year, you must file Form RPTL 467 with the Nassau County Department of Assessment by the taxable status deadline – January 4, 2021.

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

NASSAU COUNTY DEPARTMENT OF ASSESSMENT