

QUALIFICATIONS FOR THE PARTIAL TAX EXEMPTION FOR SENIOR CITIZENS
2021/22

COVID 19 APPLICATION PROCEDURE:
All applications should be mailed. The office is not accepting any walk-ins at this time. Applications can also be placed in the drop box outside our suite at 300 Pantigo place, Ste 108, East Hampton NY 11937.
Please submit your Federal Income Tax return and 1099 SSA no later than 4/15/2021

To apply for the Enhanced STAR check, please call 518-457-2036 (for owners NOT already receiving STAR)

Each of the owners must be 65 unless husband & wife or siblings in which case only one must be 65. **Proof of age** must be submitted. (Birth cert, baptismal, license, passport)

Description of property and tax map number must conform to latest assessment roll.

Applicants must have owned property for at least 12 consecutive months prior to the date of filing the application.

Property must be the **primary (permanent) residence and owner occupied.**

Property cannot be used for anything other than the legal residence.

Income of all owners including spouses **must not exceed the limit of \$37,400** and will result in a percentage assessed value exemption based on a sliding scale.

Income (of all owners plus spouses) consists of but is not limited to: Social Security, Pension, wages, dividends, interest on accounts, alimony, disability payments, workman's compensation, rent collected, etc.

A copy of the SSA-1099 Social Security Benefits form must be submitted.

All inheritances and gifts must be itemized. The source of donors should be noted.

A full copy of the 2020 Federal Income Tax form must be submitted (if filed) and the front Page of the NYS form IT-201 must be submitted no later than April 15th 2021.

Proof of income must be furnished each year by April 15th for the previous year.

A RENEWAL FORM MUST BE FILED EACH YEAR BY MARCH 1ST.

Failure to file will result in the cancellation or denial of the exemption.

This is in accordance with Real Property Tax Law 467.

TOWN OF EAST HAMPTON
BOARD OF ASSESSORS



Application for Partial Tax Exemption for Real Property of Senior Citizens

For help completing this application, see Form RP-467-I, *Instructions for Form RP-467*. You must file this application with your local assessor by the taxable status date. Do **not** file this form with the Office of Real Property Tax Services.

This form may only be used to apply for the partial tax exemption for real property of senior citizens. It may **not** be used to apply for the Enhanced STAR exemption, which is a separate exemption.

Name(s) of owner(s)	
Mailing address of owner(s) (number and street or PO box)	Location of property (street address)
City, village, or post office State ZIP code	City, town, or village State ZIP code
Daytime contact number	Evening contact number
E-mail address	School district
Tax map number of section/block/lot: Property identification (see tax bill or assessment roll)	
Name(s) of any non-owner spouse(s)	
Address(es) of primary residence(s) if different from above:	

1 Indicate which documents you included with this application as proof of age of owners (see instructions):

Driver license Birth certificate Other (specify) _____

2 Date you acquired ownership of property (see instructions): _____

3 Indicate document included with application as proof of ownership (see instructions):

Deed Other (specify) _____

4 Do all the owners of the property presently occupy the premises as their legal primary residence? Yes No

4a If the answer to 4 is No, is an owner receiving medical care as an in-patient in a residential health care facility? Yes No

4b If the answer to 4a is Yes, specify name and location of the facility: _____

4c If the answer to 4 is No, is the non-resident owner the spouse or former spouse of the resident owner?.... Yes No

4d If the answer to 4c is Yes, is he or she absent from the residence due to divorce, legal separation, or abandonment? Yes No

5 Is any portion of the property used for other than residential purposes (commercial, professional office, etc.)? ... Yes No

5a If answer is Yes, explain such use and describe the portion that is so used. _____

6 List the income of each owner and spouse of each owner for the calendar year immediately preceding date of application. Attach additional sheets if necessary. (See instructions for income to be included.)

Name of owner(s)	Source of income	Amount of income
6a Total income of owner(s)	6a	

Name of spouse(s) if not owner of property	Source of income of spouse(s)	Amount of income of spouse(s)
6b Total income of spouse(s)	6b	
6c Total income of owner(s) and spouse(s) (add line 6a and line 6b)	6c	

7 Of the income specified in line 6c how much, if any, was used to pay for an owner's care in a residential health care facility? Attach proof of amount paid: enter 0 if not applicable. (see instructions)

7	
7a Total income of owner(s) and spouse(s) (subtract line 7 from line 6c)	7a

8 If a deduction for unreimbursed medical and prescription drug expenses is authorized by any of the municipalities in which the property is located (see instructions), complete the following:

8a Unreimbursed medical and prescription drug costs (deduct any amounts reimbursed by insurance)	8a
8b Total income of owner(s) and spouse(s) (subtract line 8a from line 7a)	8b

9 If a deduction for veteran's disability compensation is authorized by any of the municipalities in which the property is located, complete the following (see instructions):

9a Veteran's disability compensation received (attach proof, enter 0 if not applicable)	9a
9b Total income of owner(s) and spouse(s) (subtract line 9a from line 8b)	9b

10 Did the owner or spouse file a federal or New York State income tax return for the preceding year? Yes No
 If answer is Yes, attach copy of such return or returns (see instructions).

11 Does a child (or children), including those of tenants or lessees, reside on the property and attend a public school, grades pre-K through 12? Yes No

11a If the answer to 11 is Yes, list name and location of school(s): _____

11b If the answer to 11 is Yes, was the child (or were the children) brought into the residence in whole or in substantial part for the purpose of attending a particular school within the school district? Yes No

I (we) certify that all statements made on this application are true and correct to the best of my (our) belief and I (we) understand that any willful false statement of material fact will be grounds for disqualification from further exemption for a period of five years, and a fine of not more than \$100.

Signature (If more than one owner, all must sign)	Marital status	Phone number	Date

This Area for Assessor's Use Only

Date application filed _____

Exemption applies to taxes levied by or for:

- Proof of age submitted
- Proof of ownership submitted
- Proof of income submitted
- Application approved
- Application disapproved

- Town _____ %
- County _____ %
- School _____ %
- Village _____ %

Assessor's signature	Date
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