

## Chaplin Newsletter – Assessor’s Office

### Guidelines for Owners’, Totally Disabled and Additional Veterans’ Tax Relief Program

#### Elderly Homeowners and Totally Disabled Individuals:

#### BASIS REQUIREMENTS:

1. Owner (or spouse, if domiciled together) must have been **65** years of age by the end of the calendar year preceding the current filing period. Totally disabled persons, regardless of age, are initially eligible provided they have a **Social Security Award Letter** specifying a date of entitlement during the current benefit year or a **SSA 1099** with Medicare premiums.
  - 1A. Applications filed under the disability provision must be accompanied by **proof of current disability**. Acceptable proofs include a SSA-1099 showing Medicare deduction, a computer generated message from Social Security that states the person is disabled and indicates from a federal, state, municipal, or other government related program deemed comparable by the Secretary of the Office of Policy and Management.
2. Claimant must own **and reside** at the property for which tax relief is sought; or he/she must hold a tenancy for life use or for a term of years in such property. Such ownership, which must constitute the claimant’s principal or legal residence, must have been effective on or before October 1st of the current assessment year. **Principal residence shall be defined as residency of at least 6 months and one day for the program year.**
3. Claimant’s qualifying income must not exceed **\$29,800 if single, or \$36,500 if married**. For married couples, income for **both** husband and wife must be counted in establishing qualifying income.
  - 3A. Proof of income may consist of your Social Security 1099 Forms, form 1099-INT (bank interest income), 1099-DIV (dividends), Form W-2P (Pension), also, if income tax is filed, we will require a copy of your adjusted gross income.
4. **Filing Period for Homeowners and Totally Disabled Programs is February 1st through May 15th! Applications Will NOT Be Accepted After The Deadline.**

**Veterans' Program:**

5. All honorably discharged veterans who served in wartime are eligible for the basic exemption of \$3000.00 off their assessment of real estate or motor vehicle(s). Special provisions apply to surviving spouses of veterans.
  - 5A. No threshold is set for the basic exemption.
  6. For basic veterans' exemptions, the veteran **must** have their **original or certified copy** of his/her DD-214 on file with the **TOWN CLERK** by **October 1st**.
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**Additional Veterans' Program: (Income Qualified)**

7. The benefits are doubled if the veteran is below certain income levels. For additional veterans' exemptions, the filing period is from **February 1st until October 1st**. To be approved for the Additional Veterans' Exemption, the claimant's qualifying income must not exceed **\$29,801** if single, or **\$36,500** if married. See Section 3A for qualifying income. Special provisions apply to surviving spouses of veterans.