



INCORPORATED VILLAGE OF LINDENHURST
430 SO. WELLWOOD AVENUE - LINDENHURST, NEW YORK 11757

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INCOME LIMIT \$37,400.00
INCOME YEAR 2020

Dear Senior Citizen,

Enclosed is the **Renewal Senior Citizen Partial Tax Exemption Application** for the Village of Lindenhurst. **All renewals, with proof of income and required documents must be submitted on or before October 1, 2021.** Your application **cannot be processed** unless all information is supplied and all questions are answered.

****Applications may be submitted at Village Hall between the hours of 9:00 AM – 2:00 PM.**

IMPORTANT INSTRUCTIONS

Please use the following list as a guide and enclose a copy of the following Documents that apply to your application.

- 1) **ENTIRE** Federal & State 2020-Income Tax Returns, including all schedules and all 1099's.
- 2) W-2 earnings- Statements from all Owners & Spouses including self-employment.
- 3) Interest & Dividend Earning Statements-Taxable & Non Taxable (All 1099 Statements for Interest Earnings on Savings Accounts,

Money Markets, Bonds, Dividends, Government & Private Retirement and Pension Plans, Annuities.

- 4) IRA end of year interest or earnings summary, showing interest earned for 2020, even if you do not take a distribution. If your IRA does not earn interest, you must provide a statement from your institution stating so. **(Note: interest or earnings are not found on your tax return, nor are they found on your 1099-R distribution statement.)**
- 5) Social Security Statements – full SSA-1099 form
- 6) Pension & Retirement Distributions – 1099 R statements
- 7) Self-Employment Income, Business & All Rental Income. Applicable tax returns with income and expense statements.
- 8) Annuity Distributions – 1099 R statements
- 9) Capital Gains
- 10) Alimony, Support Money, Money from all others living in the house, Disability Income, Veterans' Disability, VA Surviving Spouse Disability Pension, Workers Compensation.

NOTE: IF YOU ARE NOT LEGALLY REQUIRED TO FILE A TAX RETURN, YOU MUST SUPPLY PHOTOCOPIES OF ALL SOURCES OF 2020 INCOME.

If you have any questions about completing the application, contact the Assessment Department at 631-957-7506.

INC. VILLAGE OF LINDENHURST
Assessment Department

VILLAGE OF LINDENHURST

RENEWAL APPLICATION FOR PARTIAL TAX EXEMPTION FOR REAL PROPERTY OF SENIOR CITIZENS

Application must be filed with the Village of Lindenhurst Assessor before October 1st

<u>Names of ALL Owners</u>	<u>Birth Date</u>	<u>Marital Status</u>	<u>Soc. Security #</u>	<u>Mailing Address</u>

1. Name of any spouse (not listed under owners) _____

2. Telephone Number – Day () _____ Evening () _____

3. Location of property/street address _____
Tax Map Number (Section/Block/Lot) _____

4. Do you or any owners **own additional property in, or out, of NY State?** Yes _____ No _____

Address of additional property: _____

5. Since filing your application last year, describe below any changes that have taken place and answer 5a to 5d.
- Has title to the property changed due to **creation of a trust, death, or addition or deletion of an owner, etc.?** Yes _____ No _____ If "Yes," attach entire trust, new deed, death certificate, etc.
 - Has legal residence or occupancy of the property changed due to **divorce, legal separation, confinement of owner in hospital or nursing home, etc. ?** Yes _____ No _____
 - Is residence used for additional purposes? (e.g. business, retail, professional office, shop, etc.)
Yes _____ No _____ Explain _____
 - Do any children of owners, tenant or leaseholders living on the premises, attend public school grades K to 12? Yes _____ No _____

Explanation of changes that occurred as indicated in Question #5 a-d (attach additional sheets as necessary)

6. Did Owner(s) or Spouse file a **Federal or N.Y. State Income Tax Return** for previous year (2020)?
Yes _____ No _____ If "Yes," attach signed copies of submitted tax returns with documentation, year-end statements and schedules.

7. Income Eligibility Worksheet – Verification of all taxable and non-taxable income must be submitted with application including year-end statements and necessary documentation. Information will be verified.

SOURCES OF INCOME FROM ALL OWNERS & OWNER'S SPOUSE		
Gross Social Security , including Medicare. (Attach complete copy of SSA-1099)		
Salary or Wages (Attach W-2s including self-employment)		
Business Income (Attach Schedule C, S-Corp Tax Return with K-1 or Partnership Tax Return)		
Taxable & Non-Taxable Interest (Attach all 1099-INT & year-end statements for non-taxable interest)		
Taxable & Non-Taxable Dividends (Attach all 1099-DIV & year-end statements for non-taxable dividends)		
IRA Earnings (Interest, dividends, or capital gains earned) DO NOT include the amount of your distribution.		
Pensions, Annuities & Retirement Plans (Attach 1099R statements and include taxable & non-taxable pension)		
VA &/or VA Disability Pension(s) or Surviving Spouse VA Disability Pension (attach award letter)		
Capital Gains (Include tax-deferred capital gain distribution statements from financial institutions)		
Rental Income (Received from all properties)		
Disability/Worker's Compensation Payments/Unemployment Insurance Benefits		
Income from Estates or Trusts (Attach the Estate or Trust's Income Tax Return)		
Alimony and/or Child Support Payments		
Money from others living in house toward maintenance, support or expenses		
Other sources of income		
TOTALS OF ALL INCOMES	\$	\$
GRAND TOTAL	\$	

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 willful false statement of fact will be grounds for disqualification from further exemption for a period of five (5) years and a fine as set forth in New York State Real Property Tax Law #467.

Signature(s) (ALL Owners)

Date

Signature(s) (ALL Owners)

Date

