

ELDERLY AND DISABLED HOMEOWNERS PROGRAM UPDATE

Applies to both the State and Town Programs

Application Period: Tuesday, February 1, 2022 to Monday, May 16, 2022.

Town Programs Offered

The town offers a choice of two programs:

- Tax Credit: Tax bill is reduced by a dollar amount ranging from \$312 to \$2,600 based on a sliding scale according to applicant's income;
- Tax Deferral: Defer payment of up to 75% of tax obligation. The amount deferred is a lien on the real estate carrying an interest rate of 3% per annum. Deferred amount is reimbursed to the town upon the death of the recipient, conveyance of the real estate, or non-residency of the applicant. Note: many mortgage holders do not allow for tax liens on real estate – please check with your financial institution or financial adviser.

State Tax Relief

If an applicant's **2021** income is under \$38,100 for a single person or \$46,400 for a married couple, they are eligible for credit from the State as well as from the Town. If eligible a state application will be completed at the same time as the town application.

Current Applicants

Existing applicants **MUST** file if they:

- Were required to apply for the 2019 Grand List but were given an automatic extension (aka odd year filers). ****NOTE: A letter will be mailed to all applicants who are required to reapply for the 2021 Grand List.***
- Or anyone who is currently on the program who has had a **reduction** in income since the last time they have applied.

Do I Qualify

To qualify for the 2021 Grand List Year Town tax relief:

- Persons must be **at least 65 years** of age or **totally disabled** (receiving total disability payments from Social Security or from any other government disability program) as of **December 31, 2021**.
- Total qualifying income cannot exceed \$70,000 for the town program. This is the total income plus the FULL amount of social security (not just the taxable portion of social security).
- No allowances for business losses in excess of capital gains or negative income.
- See State Tax Relief for income eligibility requirements in addition to the Town's.

- The property for which the tax relief is claimed must be the legal residence of the applicant and occupied by them more than 183 days of each year.
- Own and reside in Trumbull for one consecutive year prior to receiving benefits.

For qualification questions please contact the Assessor's Office at 203.452.5016

When to Apply

The Filing Period for the 2021 Grand List Year for the Senior and Totally Disabled Tax Relief, for both Town and State, is **Tuesday, February 1, 2022** through **Monday, May 16, 2022**. According to State Statute, all applications must be made during this period.

Extensions to this filing deadline are only granted for "extenuating circumstances due to illness or incapacitation as evidenced by a physician's certificate or other good cause." Requests for extensions must be made by application to the State of Connecticut Office of Policy and Management by August 15, 2022.

How to Apply

Walk-ins are welcome. There is no need for an appointment. Applicants must meet in person with a staff member from the Assessor's Office to file. Application hours are 9:00am-4:00pm, Monday through Friday during the Application Period. You must bring **all proof of income** for the previous calendar year with you (see list below under 'What to Bring').

What to Bring

Applicants must bring proof of income from the previous calendar year. Applicants need to provide all information at time of filing. Applications must be completed by the due date of May 16, 2022 to be considered on time.

Proof of income includes:

- a **completed and signed** copy of your **2021** income tax form 1040 or 1040A including all accompanying schedules;
- a copy of the **2021** social security form 1099;
- all other 1099 forms whether taxable or not.

All income from all sources for the previous 2021 calendar year must be considered for any tax relief program.

For those who do not file an income tax form - copies of all 1099 forms both taxable and non-taxable are required (SSA-1099; 1099-Div.; 1099-Int.; 1099-R; etc.).