

OFFICE OF TOWN ASSESSOR
TOWN OF WESTERLY, RHODE ISLAND
2019 APPLICATION OF SENIOR CITIZEN PROPERTY EXEMPTION

Instructions:

- You must submit an application every year to receive this tax exemption.
- The deadline to file this form is April 30th of the year for which you are requesting the exemption.
- To be eligible for this tax exemption:
 - *Applicant must be 65 years or older
 - *You must be owner and occupant of a residential property in Westerly for a period of five years.
 - *Westerly must be your full time primary residence.
 - *Your annual gross household income can be no higher than the limit in §229-2 of the Westerly Code of Ordinances. The income limit is subject to change each year.
- You must complete the Statement of Annual Household Income on page 2 of this form.
- You must submit a copy of your federal income tax return for last year if you file one **AND** the year-end income statements used to process your return. Also include non-taxable income statements.
- If a federal income tax return is filed, applicant(s) must submit the signed copy of IRS Form 4506, which gives the Assessor the right to request information from the IRS regarding your tax return. Any expense is borne by the town.
- Town Assessor has the right to ask you to submit additional documentation of income or proof of residency.

1. Name: _____ D/O/B _____
2. Marital Status: _____ Name of Spouse if married: _____
3. Spouse's D/O/B: _____
4. Residence Address: _____
5. How long a resident at above address: _____
6. Previous Address: _____
7. Do you file a federal income tax return? _____ Last year filed: _____
8. Number of persons residing at residence: _____ Phone No. _____
9. Name(s) and Age(s) of person(s) living with you other than your spouse: _____

10. Do you reside at above address for 12 months each year? _____
11. Do you own any other property in Westerly or any other state? _____
 - If Yes, where? _____
11. Are you a legal resident of Westerly? _____
12. Are you a registered voter in Westerly? _____
13. Have you previously been granted this exemption? _____
 - If Yes, when? _____

DO NOT USE: Book: _____ Page _____ Rec. Date _____ How property is owned: _____ Life estate? _____
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CONFIDENTIAL STATEMENT OF ANNUAL INCOME

HOUSEHOLD INCOME: (If married, include income of spouse or the income of any other co-tenants or joint tenants living in residence, including family members.)

Wages, salaries, tips, Etc. _____
Dividends: _____
Interest: _____
Social Security Benefits FICA less Medicare expense _____
Retirement (Pensions or Annuities) _____
Capital Gains, Gifts or Inheritances _____
Net Rental Income _____
Family Assistance _____
Assistance from other sources _____
Net Business Income _____
Other- Explain _____

APPLICATION WILL NOT BE ACCEPTED WITHOUT PROOF OF ALL FORMS OF INCOME LISTED ABOVE. IF TAXES WERE FILED, A COPY OF THE FEDERAL INCOME TAX RETURN AND ALL SUPPORTING DOCUMENTS MUST ACCOMPANY THIS FORM.

I the undersigned _____, do hereby swear or affirm that this application and all the information are true, correct, and complete to the best of my knowledge and belief. Verification may be obtained from any source herein with full permission of said applicant.

DATE

PROPERTY OWNER SIGNATURE

Subscribed and Sworn before me this _____ day of _____, 20 _____.

Notary Public

***IF PREVIOUSLY GRANTED THIS EXEMPTION, NOTARIZATION NOT REQUIRED.**