

Elderly/Disabled Homeowner Property Tax Relief Programs - 2023 Grand List
Application Deadline: May 15, 2024

Eligibility Requirements:

- Applicant (or spouse) must have been 65 years of age by December 31, 2023. Totally disabled persons, regardless of age, are eligible, but must provide current proof of disability.
- Applicant or spouse must have become the legal owner of the property for which tax relief is sought on or before October 1, 2023. Property must be the **applicant's primary or legal residence**. (Primary residence is defined as residency of at least 183 days for a calendar year). If property is in a Trust, a copy of the trust document is required.
- **State of Connecticut Program**
 - Qualifying income must not exceed \$43,800 if unmarried, or \$53,400 if married.
 - For married couples, income of both husband and wife must be counted in establishing qualifying income.
- **City of Stamford Local Program**
 - Applicant or spouse must have been real property taxpayers of Stamford for one year immediately preceding their receipt of tax benefits.
 - Qualifying income must not exceed \$91,800 if unmarried, or \$108,000 if married.
 - Assets* cannot exceed \$400,000 for unmarried applicants or \$600,000 for married applicants exclusive of an allowance of up to \$1,000,000 off of the equity value of the residence for which the tax relief is sought.
 - **Applicants must have no past due real property or motor vehicle taxes owed to the City of Stamford unless they are participating in a City approved payment plan and are less than sixty (60) days past due on such payment plan.**

* The worksheet attached should be completed in order to determine the total assets as required for the City of Stamford Tax Abatement for Elderly & Disabled homeowners per City of Stamford Ord.1282 Supplemental.

Required Documents:

- *Completed asset worksheet*
- *A copy of your 2023 SOCIAL SECURITY STATEMENT (FORM SSA1099) If married, we will need both.*
- *A copy of your 2023 FEDERAL TAX RETURN (FORM 1040) IF YOU ARE REQUIRED TO FILE.*
(If there are Schedule 1 and/or Schedule E attached to Form 1040, we will need a copy as well.)
- *IF YOU ARE **NOT** REQUIRED TO FILE FEDERAL TAX RETURN, COPIES OF PROOFS OF INCOME FOR 2023*
(Including but not limited to wages, lottery winnings, taxable pensions, IRA's, interest, dividends, net rental income, Federal Supplemental Security Income, State of Connecticut public assistance payments, General Assistance, veteran's pensions, veteran's disability payments, and any other income not listed above)

How to Apply: By Mail or In Person

1. By Mail:

Please mail the required documents (listed above) to the following address **by April 15, 2024**:**

City of Stamford Tax Assessor's Office
Homeowner Tax Abatement Program
888 Washington Blvd., 6th FL
Stamford, CT 06901

** From April 16, 2024 through May 15, 2024, applications can be submitted in-person by appointment only.

2. In Person:

Please call (203) 977-5888 to schedule an appointment.

Note: If an application is filed before the deadline, you will receive a copy of the finalized application for your records by mid-June 2024. If your application is approved, the tax credit(s) will be applied to the real estate tax bill starting June 2024. You are required to re-apply for the program(s) every two years.

If you have any questions or need additional information, please call (203) 977-4016 or (203) 977-4904.

Asset Worksheet for City of Stamford Tax Abatement Ord. 1282 Supplemental – 2023 Grand List

Applicant's Name: _____ **Applicant's Birthdate (mm/dd/yyyy):** _____

Spouse's Name: _____ **Spouse's Birthdate (mm/dd/yyyy):** _____

Primary Residence Address: _____ **Phone Number:** _____

1. Are you or your spouse a resident of a healthcare or a nursing home facility in Connecticut?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
2. Did or will you file a Federal Income Tax Return for 2023?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
3. Are you receiving any Residency Based Tax Benefits in any other municipality or state?	Yes <input type="checkbox"/>	No <input type="checkbox"/>
If yes, where?: _____		
4. Liabilities (for primary residence) – the total balance owed for any mortgages, home improvement loans, bank loans, etc. Do not include credit card debt. If none, please enter “0”. _____		
5. Cash on Hand and in the Bank – total balance as of today. If none, please enter “0”. Cash*: _____ Checking: _____ Savings: _____ CD's: _____ (*cash you keep at home and in your wallet)		
6. Stocks & Bonds – total cash value amount of all bonds, savings bonds or stocks (the amount you would receive if you cashed them in today). If none, please enter “0”. _____		
7. Retirement Accounts, Annuities or Deferred Compensation – total cash value of any retirement accounts (e.g. 401K, IRA), Annuities, Deferred Compensation, and any loan or mortgage moneys owed to you or your spouse. If none, please enter “0”. _____		
8. Fair Market Value of all Other Real Estate - list fair market (sale value) of any other real estate owned by you (includes property located in other states or countries). Do not include your primary residence. If none, please check this box: <input type="checkbox"/>		
_____	_____	_____
Address of Property (Including City & State)	Market Value	Mortgage Liability
_____	_____	_____
Address of Property (Including City & State)	Market Value	Mortgage Liability
_____	_____	_____
Address of Property (Including City & State)	Market Value	Mortgage Liability
9. Motor Vehicles and All Other Assets not listed above - this includes, but is not limited to, any vehicles owned by you (list vehicle year/make/and model), along with any other assets not included above. If none, please check this box: <input type="checkbox"/>		
_____	_____	_____
Vehicle 1: Year Make Model	Vehicle 2: Year Make Model	
_____	_____	
Vehicle 3: Year Make Model	Vehicle 4: Year Make Model	
_____	_____	
Other Assets: (please list total value): _____		

Applicant's Signature: _____ **Date Signed (mm/dd/yyyy):** _____

THIS WORKSHEET AND INCOME DOCUMENTATION MUST BE RECEIVED BY TAX ASSESSOR'S OFFICE ON OR BEFORE MAY 15, 2024

City of Stamford Tax Assessor's Office, 888 Washington Blvd 6th FL, Stamford, CT 06901

Actual amount of credit received will be based on the number of applications approved. The City of Stamford Board of Representatives has placed a cap on the maximum credit dollars allowed.