

# Income Worksheet Checklist for Seniors with Limited Income

Total gross income of all owners and spouses residing on the premises must be \$35,400 or less.

The above exemption program is based in large part on financial need. Submit copies of all items for the year of **2017**, including year-end statements. Review, check off all that applies to **your income** and return this checklist with application.

- Federal and NYS Individual Income Tax Return / including Schedules C, E, F (if filed)/IRS Form 8829(if filed)
- If you have an IRA or an Annuity, you MUST bring in the 2017 Annual/End of the Year Statement from the IRA and/or Annuity Institution. (this is NOT a 1099 form or tax statement given to the tax preparer)**

**If you DO NOT** file a tax return you will need to give your financial information to the assessor's office either by mail or in person. Review and check off all that applies to your household. Submit this checklist along with your application.

- Salary or Wages (W-2), including bonuses and /or tips
- Self-employment NET Income (must show both income and expenses)
- Social Security (Form SSA 1099)
- Retirement/Pensions)/ IRA investment (s) (Form 1099)
- Annuity Payment (Form 1099)
- Annual earnings statements on IRA accounts, non-taxable, however invested (interest, dividends and/or capital gains)**
- Interest or Dividend bearing Savings or Checking accounts
- Investment Dividends or Interest, including non-taxable bonds
- Capital Gains from sale or exchange of investments
- Rental Income and Expenses
- Disability Payments ( including VA and/or Railroad Benefits) and/or Worker's Compensation
- Unemployment Insurance Payments \_\_\_\_\_ Alimony or Support Payments
- Foreign country Income (wages, bank accts, investments) \_\_\_\_\_ Lottery/Gambling winnings
- Additional income from family/others to help with household finances

**FAILURE TO PROVIDE THE ABOVE DOCUMENTS BY MARCH 1, 2019 WILL RESULT IN DENIAL OF THE EXEMPTION APPLICATION.** (You may file **any time** before March 1<sup>st</sup>)

*When filing by mail; if you wish a receipt, please enclose a stamped, self-addressed envelope.*

**If you need help with your application you may contact Senior Outreach Services at 636-3070**

**TOWN OF AMHERST ASSESSOR'S OFFICE**

**5583 MAIN STREET, WILLIAMSVILLE, NY 14221**

**716-631-7038 M-F 8:30-4:30**