

Income Worksheet Checklist for Persons with Disabilities and Limited Income

Total gross income of all owners and spouses must be \$37,400 or less

The above exemption program is based in large part on financial need. Submit copies of all items for the year of **2023**, including year-end statements. Review, check off all that applies and return this checklist along with your application.

Federal and NYS Individual Income Tax Return / including Schedules C, E, F (if filed)/IRS Form 8829 (if filed)

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)

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, 2025 WILL RESULT IN DENIAL OF THE EXEMPTION APPLICATION.

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

TOWN OF AMHERST ASSESSOR'S OFFICE

5583 MAIN STREET, WILLIAMSVILLE, NY 14221

716-631-7038 M-F 8:00-4:00