

Income Worksheet Checklist for Seniors with Limited Income

Total gross income of all owners and spouses residing on the premises must be \$37,399 or less.

The above exemption program is based in large part on financial need. Submit copies of all items for the year of **2021**, including year-end statements. Review, check off all that applies to **your income** and return this checklist with application by March 1, 2023.

- 2021 Federal Individual Income Tax Return(unless you only file with NYS) / 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 2021 Annual/End of the Year Statement from the IRA and/or Annuity Institution.**

If you **DO NOT** file a tax return you will need to give your financial information to the assessor's office by mail, drop box or in person. Review 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/End of the Year Statement from the IRA and/or Annuity Institution, however invested (interest, dividends and/or capital gains).This is NOT something you give your tax preparer.**
- 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, 2023, WILL RESULT IN DENIAL OF THE EXEMPTION APPLICATION. (You may file **any time** before March 1st)

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 8:00-4:00