

Mayor
Dennis M. Siry

Village of Amityville

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Catherine C. Murdock

Trustees
Kevin P. Smith
Michael O'Neill
Owen E. Brooks, Jr.
Roger Smith



Assessor
Thomas Donato

Building Inspector
Michael Breitweg

Village Attorney
Bruce Kennedy

Superintendent of Public Works
Bruce S. Hopper

Re: Application for Partial Senior Citizen Exemption for Real Property Taxes

Dear Senior:

Enclosed is an application for **Partial Senior Citizen Exemption for Real Property Taxes** for the 2024/2025 tax year. The application must be filed by **December 31, 2023** or it cannot be accepted by the Assessor.

Due to changes in New York State Real Property Tax Law, the application process has changed. Applicants should read the following information to ensure they are providing sufficient proof of income.

- 1. Residents who filed a 2022 Federal Income Tax Return (IRS 1040) in April 2023 must provide a copy of their federal tax return.**
- 2. Residents who did not file a 2022 Federal Income Tax Return (IRS 1040) must provide documentation to substantiate 2022 income. Please see below for examples of income types and documents required.**

Social Security Benefits (SSA-1099 form), salaries/wages/tips (W-2 form), pension and retirement distributions (1099-R form), IRA distributions (1099-R form), interest earned on bank accounts and dividends (1099-INT form).

In addition, all new applicants must include **proof of age** (ex. birth certificate, driver's license) and **proof of property ownership** (ex. deed, mortgage documents).

If you need any assistance in completing this application, please contact the Assessor's office at 631-264-6000 or visit Village Hall during normal business hours.

Regards,
Thomas Donato
Assessor

TD/jr

21 Ireland Pl • Amityville, NY 11701
Tel (631) 264-6000 • Fax (631) 598-0363
KEEP YOUR DOWNTOWN STRONG, SUPPORT YOUR LOCAL MERCHANTS

Village of Amityville



Senior Citizen Tax Exemption Income Limits and Scale

Not more than \$29,000:	50%
More than \$29,000 but less than \$30,000:	45%
More than \$30,000 but less than \$31,000:	40%
More than \$31,000 but less than \$32,000:	35%
More than \$32,000 but less than \$32,900:	30%
More than \$32,900 but less than \$33,800:	25%
More than \$33,800 but less than \$34,700:	20%
More than \$34,700 but less than \$35,600:	15%
More than \$35,600 but less than \$36,500:	10%
More than \$36,500 but less than \$37,400:	5%



Village of Amityville
 21 Ireland Place, Amityville, NY 11701

Application for: PARTIAL TAX EXEMPTION FOR REAL PROPERTY OF SENIOR CITIZENS

*Application must be filed with the Village of Amityville Assessor before December 31st for the May tax roll.
 You must be 65 years of age to be eligible.*

1. Name and telephone no. of owner(s)

Day No. () _____

Evening No. () _____

2. Mailing address of owner(s)

Name of Resident Spouse (if not listed as Owner) _____

3. Location of Property

 Street Address

 Tax Map Number or Section/Block/Lot

4. Proof of age of owners (please check documents submitted)

Birth Certificate
 Driver's license

Other (specify) _____

5. Date applicant(s) acquired ownership of property: _____

6. Indicate document submitted with application as proof of ownership:

Deed Mortgage Other (specify) _____

7. Do all the owners of the property presently reside on the premises? Yes No

If the answer is NO, is an owner receiving medical care as an in-patient in a residential health care facility? Yes No

If answer is YES, specify name and location of facility: _____

If answer is NO, is the non-resident owner the spouse or former spouse of the resident owner who is absent from the residence due to divorce, legal separation or abandonment? YES NO

If answer is NO, please explain: _____

8. If any portion of the property used for other than residential purposes (farming, commercial, vacant land, professional office, etc.)? Yes No

If the answer is YES, explain such use and describe the portion of the property that is so used below:

9. Did owner or spouse file a Federal Income Tax Return for the above calendar year?

Yes No If YES, please attach a copy of such return and complete page 4 of packet
 If NO, please complete page 5 of packet

COMPLETE THIS WORKSHEET IF YOU FILED A 2022 FEDERAL TAX RETURN

9. Income Eligibility Worksheet

Based on Income received in the Calendar Year preceding the date of filing (please refer to cover letter)

Federal Adjusted Gross Income (FAGI) _____ (Line 11 of IRS 1040)

ADD

Tax Exempt Interest + _____ (Line 2a of IRS 1040)

Social Security Benefits Excluded From FAGI + _____ (Subtract line 6b from line 6a of IRS 1040)

DEDUCT

Taxable IRA Distributions - _____ (Line 4b of IRS 1040)

Losses from IRS 1040 lines 7 and 8 - _____ (Attach schedule 1, \$15,000 limit)

Total Income of owner(s) and spouse(s) \$ _____

I certify that all statements made on this application are true and correct to the best of my belief and I understand that any willful false statement of material fact will be grounds for disqualification from further exemption for a period of five years and a fine of not more than \$100.

SIGNATURE

(If more than one owner, all must sign)

MARITAL STATUS

DATE

COMPLETE THIS WORKSHEET IF YOU DID NOT FILE A 2022 FEDERAL TAX RETURN

9. Income Eligibility Worksheet

Based on Income received in the Calendar Year preceding the date of filing (please refer to cover letter)

Total wages, salaries, and tips	_____	(include copy of W-2)
Total Social Security Benefits	_____	(include copy of SSA-1099)
Total interest income and dividends	_____	(include copy of 1099-INT)
Unemployment compensation	_____	
Total IRA distributions	_____	(include copy of 1099-R(s))
Total pensions and annuities other than IRA's	_____	(include copy of 1099-R(s))
Other Income: _____	_____	
Total Income of owner(s) and spouse(s)	\$ _____	

I certify that all statements made on this application are true and correct to the best of my belief and I understand that any willful false statement of material fact will be grounds for disqualification from further exemption for a period of five years and a fine of not more than \$100.

SIGNATURE (If more than one owner, all must sign)	MARITAL STATUS	DATE
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

Before you submit your application – did you...

- Include proof of age?
- Include proof of ownership of the property?

If you filed a federal tax return – did you...

- Include a copy of your 2022 tax return?
- Sign and date the application?

If you did not file a federal tax return – did you...

- Include your annual social security statement (SSA-1099)?
- Include documentation of pension/retirement distributions (1099-R)?
- Include documentation of IRA distributions (1099-R)?
- Include end of year statements (1099-INT) for dividends and interest earned on bank accounts?
- Sign and date the application?

