

#### PARTIAL EXEMPTION FOR SENIORS APPLICATIONS RECEIVED AFTER THE FILING DEADLINE WILL BE DENIED

Filing Deadline:

December 31st

Applications Accepted: In Person:

Monday through Friday 9:00am to 4:00pm

Mail: Must be RECEIVED no later than December 31st

Port Jefferson Village Assessor's Office 121 West Broadway Port Jefferson, NY 11777

#### Requirements:

- The applicant must be the recorded owner and occupant of one, two, three-family residence or condominium (the partial senior exemption is not available for seasonal residents).
- All owners must be 65 years of age or older by December 31st. Property owned by a married couple or siblings, only one must be 65 years of age or older.
- Combined GROSS income of ALL owners and spouse(s) cannot exceed \$58,400
- The eligible application must be the recorded owner and/or spouse of the home within the Village of Port Jefferson for 12 months prior to December 31st.

#### The Village of Port Jefferson requires the following information PHOTOCOPIED AND SUBMITTED In addition to the COMPLETED and SIGNED application

- 1. To prove ownership you must provide a "Deed" for the house/condominium.
- 2. To prove age you must provide one of the following for each applicant:
  - a) NY Driver's License or NY Non-Driver ID
  - b) Birth Certificate
  - c) Passport
- 3. To prove residency you must provide one of the following for each application AND spouse:
  - 1. NY Driver's License or NY Non-Driver ID
  - 2. Car Registration
  - 3. Voter's Registration Card

#### All income submitted must be from the prior tax year TO PROVE GROSS INCOME YOU MUST SUBMIT PHOTOCOPIES OF THE FOLLOWING: FOR ALL OWNERS AND SPOUSES

(No originals please, as they will not be returned to you)

- 1. **ENTIRE** Federal Income Tax Return 1040 or 1040a, including **ALL** Schedules.
- 2. Page 1 of your New York Income Tax Return.
- 3. Social Security, IRA, Pension and Annuity 1099's. MUST include any non-taxable items such as Railroad, Police, Fireman, VA, Worker's Compensation or Private Disability.
- 4. IRA End of Year Income Summary, final Yearly Statement, Snapshot, or Performance Summary etc. for ALL IRA accounts to provide earnings. (information is not found on Tax Return or 1099's)
- 5. Proof of any rental or business income.
- 6. Applications must report any monthly contributions towards household expenses from anyone living on premises (rent from family members, friends or tenants).
- 7. Copy of most recent mortgage, reverse mortgage or home equity loan statement.

#### IF YOU ARE NOT REQUIRED TO FILE A TAX RETURN YOU MUST SUPPLY PHOTOCOPY PROOF OF ALL **SOURCES OF INCOME INCLUDING ALL 1099'S** WE ALSO MAY REQUIRE PROOF OF NON FILING IRS FORM 4506-T

Approval:

If this exemption is approved, the savings will be applied to the June tax bill.

Denial:

Notice of Denials will be mailed to applicants

Mandatory Renewing: The PARTIAL SENIOR EXEMPTION RENEWAL must be renewed each year by **December 31st.** Approved Exemptions will automatically receive a "Renewal Application" for the following year. Please call our office if you do not receive

your renewal by November 31st.



Department of Taxation and Finance Office of Real Property Tax Services

**RP-467** 

(8/23)

## **Application for Senior Citizens Exemption**

For help completing this application, see Form RP-467-I, *Instructions for Forms RP-467 and RP-467-Rnw*. You must file this application with your local assessor by the taxable status date. Do **not** file this form with the Office of Real Property Tax Services.

Na	me(s) of	owner(s)			110 000					
Mailing address of owner(s) (number and street or PO Box)					Location of property (street address)					
City, village, or post office State ZIP code					City, town, or village	State	ZIP code			
Daytime contact number Evening contact number					School district					
Em	ail addres	SS			Tax map number of section/block/le	ot: Property identification (see t	tax bill or asses	sment roll)		
Mar	no(e) of a	any non-owner spouse(s)								
IVAI	ne(s) or a	any non-owner spouse(s)								
Add	iress(es)	of primary residence(s) if differ	ent from above:							
2	Driver Date y Indica Deed Do all If Yes,	r license	certificate  of property (see instant) with application as party)  perty presently occur medical care as an	Other (specistructions): proof of owners upy the premises		idence?	. Yes 🗌	No   No		
	 4b	Is the non-resident ow If No, skip to line 5.	ner the spouse or f	former spouse o	of the resident owner?		. Yes 🗌	No 🗌		
	4c	Are they absent from t	the residence due t	o divorce, legal	separation, or abandonme	ent?	Yes 🗌	No 🗌		
5	Is any portion of the property used for purposes other than residential, such as commercial, or									
	professional offices?						. Yes $\square$	No $\square$		
	If Yes, explain such use and describe the portion that is so used.									
6	to dete	rmine the applicable incor , attach copy of such re	me tax year)		applicable income tax yea			No 🗌		
	If No, complete Form RP-467-Wkst, Income Worksheet for Senior Citizens Exemption. Any spouse or owner completing RP-467-Wkst should skip questions 7 through 7c									

Name of owner(s)	B FAGI	
\ .		•
7a Total FAGI of owner(s) (add column B)	. 7a	
A Name of spouse(s) if not owner of property	B FAGI	
7b Total FAGI of spouse(s) (add column B)	. 7b	
7c Total FAGI of owner(s) and spouse(s) (add lines 7a and 7b)	. 7c	
Total income from RP-467-Wkst. Enter 0 if not applicable.	. 8	
If a deduction for unreimbursed medical and prescription drug expenses is authorized by any of the municipalities in which the property is located (see instructions), enter the unreimbursed medical and prescription drug costs (deduct any amounts reimbursed by insurance).	. 9	
Of the income specified in line 8 of Form RP-467-Wkst how much, if any, was used to pay for an owner's care in a residential health care facility? Attach proof of amount paid; enter <i>0</i> if not applicable (see instructions).	. 10	
<b>Note:</b> There are various adjustments to income regarding eligibility for this exemption. Some coption by your taxing jurisdictions (municipality, school district, and county). The assessor will the adjustments available in your taxing jurisdictions.		
Does a child (or children), including those of tenants or lessees, reside on the property and att public school, grades Pre-K through 12?	end a Yes	No
If Yes, complete lines 11a and 11b.		

I (we) certify that all statements made on this application are true and correct to the best of my (our) belief. I (we) understand that any willful false statement of material fact will be grounds for disqualification from further exemption for a period of five years, as well as a fine.

Signature (If more than one owner, all must sign)	Marital status	Phone number	Date
	sessor's Use Onl		
Date application filed	Exemption a	oplies to taxes levied by or for:	
Action on application: Approved Disapproved	_xompaon a	pp.100 to taxtoo 10110a by 61 161.	
Proof of age submitted	Town	%	
	County	%   🔲	
	County School	_	
Proof of ownership submitted Proof of income submitted	School Village	%	
	School Village	% 🔲	
	School Village	%	
	School Village	%	



Department of Taxation and Finance Office of Real Property Tax Services RP-467-Wkst

(8/23)

# **Income Worksheet for Senior Citizens Exemption**

To be used by individuals filing Forms RP-467 or RP-467-Rnw who are not required to file a federal income tax return.

Name of owner(s) and owner(s) spouse(s)					
Location of property					
Street address				City/to	wn
1 m		·			
Village (if any)		School district			
,					
	Applicable	income tax year (see n	ote belc	ow)	
Note: In localities where the taxable status of calendar year. In localities where the taxable calendar year. To confirm if your locality has	e status date is <b>on or aft</b> a taxable status date of	er April 15, the applicabl April 15 or later, see For	e incom m RP-4	ne tax y 67-I.	year is the most recent
Enter the amounts below that would have be nearest whole dollar). To round to the nearest increase amounts that are 50 cents or more	dollar, drop amounts that	t are less than 50 cents (	for exai		
1 Total wages, salaries, and tips (attach W-	2(s))		1		
2 Total interest income and dividends			2		
3 Unemployment compensation			3		·
4 Total IRA distributions (attach all Forms 10s	99-R)		4		· · · · · · · · · · · · · · · · · · ·
5 Total pensions and annuities other than I	IRA's (attach all Forms 109	9-R)	5		· · · · · · · · · · · · · · · · · · ·
6 Total Social Security benefits (attach Form	n SSA1099)		6		· · · · · · · · · · · · · · · · · · ·
7 Other income			7		
Types of other income:	<del> </del>				
8 Add lines 1 through 7. Enter the total on	line 8 of Form RP-467 or	r RP-467-Rnw	8		
Certification I (we) certify that all of the above information All owner(s) and their spouse(s) must sign a		(we are) not required to	file a fe	deral i	ncome tax return.
Signature			<del></del>		Date
Signature		•			Date
Signature		<u> </u>			Date
Signature	<del>.</del>		<del></del>		Date



#### NYS BOARD OF REAL PROPERTY SERVICES

#### AFFIDAVIT OF CONTINUED ELIGIBILITY FOR COUNTY/CITY/TOWN/VILLAGE PARTIAL TAX EXEMPTION FOR REAL PROPERTY OF SENIOR CITIZENS AND FOR ENHANCED SCHOOL TAX RELIEF (STAR) EXEMPTIONS

(see reverse side for general information and instructions)

Stat	ate of New York	
Cou	ounty of	SS:
		being duly gwern, denoted and cov(a)
	(Name of owner(s))	, being duly sworn, depose(s) and say(s):
1.	I am/We are the owner(s) of real property	erty located at:
	Street Address	
		, City/Town of
	State of New York	
2.	Property identification (see tax bill or	assessment roll)
	Tax map number or section/block/lot	
3.	My/Our post office address is:	
		Evening ( )
4.	reside on the property; and	· · · · · · · · · · · · · · · · · · ·
5.	following municipalities: (Cross out a	ar is not more than the maximum income allowed by the my municipality after a, b, and c, if your total income last punt allowed by that municipality; see back of form for
		Signature of Owner
		Signature of Owner
Subs	oscribed to and sworn to before me, this day of, 20	· ·
	Co	ommissioner of deeds or notary public

In the event you are not filing tax returns any longer, please complete and forward the attached 4506T form to the IRS for confirmation for our records.

Should you need assistance, please call Kelly Reilly at 631-473-4724 extension 211. We appreciate your cooperation.

Department of the Treasury Internal Revenue Service

### Request for Transcript of Tax Return

▶ Do not sign this form unless all applicable lines have been completed. ▶ Request may be rejected if the form is incomplete or illegible.

▶ For more information about Form 4506-T, visit www.irs.gov/form4506t.

OMB No. 1545-1872

Tip.	Use autor	Form 4506-T to order a transcript or other return information free of o	charge. See the product list below. You Get a Tax Transcript" under "Tools"					
			e to get a copy of your return.					
1:	a Na sh	ame shown on tax return. If a joint return, enter the name lown first.	ib First social security number on number, or employer identifica	tax return, individual taxpayer identificatio tion number (see instructions)				
28	a Ifa	a joint réturn, enter spouse's name shown on tax return.	2b Second social security nunidentification number if join	nber or individual taxpayer it tax return				
3	. Çu	rrent name, address (including apt., room, or suite no.), city, state	and ZIP code (see instructions)	<del></del>				
4	Pre	vious address shown on the last return filed if different from line \$	3 (see instructions)					
- F	Cuet	omer file number (if applicable) (see instructions)						
		orner life furtibler (it applicable) (see instructions)		The state of the s				
<u> </u>								
Note: Page	Effe 2 for	ctive July 2019, the IRS will mail tax transcript requests only to yo additional information.	our address of record. See What's	New under Future Developments on				
6	Tra	anscript requested. Enter the tax form number here (1040, 1065 mber per request. ▶	5, 1120, etc.) and check the approp	riate box below. Enter only one tax for				
a	•			•				
	Fo	sturn Transcript, which includes most of the line Items of a tax anges made to the account after the return is processed. Trans rm 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, d returns processed during the prior 3 processing years, Most red	and Form 11709. Detum terms to	lowing returns: Form 1040 series,				
	Acc	count Transcript, which contains information on the financial sta resements, and adjustments made by you or the IRS after the retu I estimated tax payments. Account transcripts are available for mos	itus of the account, such as payme	nts made on the account, penalty				
C	Re	Record of Account, which provides the most detailed information as it is a combination of the Return Transcript and the Account Transcript. Available for current year and 3 prior tax years. Most requests will be processed within 10 business days						
Verification of Nonfiling, which is proof from the IRS that you did not file a return for the year. Current year requests after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 in the content of the processed								
8,	thes tran	m W-2, Form 1099 series, Form 1098 series, or Form 5498 series information returns. State or local information is not included a script information for up to 10 years. Information for the current year up to 2016, filed in 2017, will likely not be available to see, you should contact the Social Security Administration at 1-80	es transcript. The IRS can provide a with the Form W-2 information. The r is generally not available until the pable from the IRS until 2012. Is not a	transcript that includes data from IRS may be able to provide this ear after it is filed with the IRS. For				
Сациоі	11. [1]	you need a copy of Form W-2 or Form 1099, you should first cont turn, you must use Form 4506 and request a copy of your return,	not the never To get a serve at the	Form W-2 or Form 1099 filed				
9	Yea	r or period requested. Enter the ending date of the year or pe	ried using the mm/dd/sess forms	. If you are requesting more than four				
		custor or tay period concretely	ests relating to quarterly tax return	s, such as Form 941, you must enter				
		1 - James of the portou departurery.						
		not sign this form unless all applicable lines have been complete						
hareho	lder, hat l	f taxpayer(s). I declare that I am either the taxpayer whose na requested. If the request applies to a joint return, at least one partner, managing member, guardian, tax matters partner, exe have the authority to execute Form 4506-T on behalf of the tax te.	spouse must sign, it signed by a	corporate officer, 1 percent or more				
☐ Sign	iator, the a	y attests that he/she has read the attestation clause and upon so authority to sign the Form 4506-T. See instructions.	o reading declares that he/she	Phone number of taxpayer on line 1a or 2a				
	A							
	7	Signature (see instructions)	Date	· · · · · · · · · · · · · · · · · · ·				
ign	Þ	TIAL REIL						
ere	,	Title (if line 1 a above is a corporation, partnership, estate, or trust)	•					
	r	Spouse's signature	Date	- ··· · · · · · · · · · · · · · · · · ·				

Date

Section references are to the Internal Revenue Code unless otherwise noted.

#### **Future Developments**

For the latest information about Form 4506-T and its instructions, go to www.irs.gov/form4506t. Information about any recent developments affecting Form 4506-T (such as legislation enacted after we released it) will be posted on that page.

What's New. As part of its ongoing efforts to protect taxpayer data, the Internal Revenue Service announced that in July 2019, it will stop all third-party mailings of requested transcripts. After this date masked Tax Transcripts will only be mailed to the taxpayer's address of record.

If a third-party is unable to accept a Tax Transcript malled to the taxpayer, they may either contract with an existing IVES participant or become an IVES participant themselves. For additional information about the IVES program, go to www.irs.gov and search IVES.

#### **General Instructions**

Caution: Do not sign this form unless all applicable lines have been completed.

Purpose of form. Use Form 4506-T to request tax return information. Taxpayers using a tax year beginning in one calendar year and ending in the following year (fiscal tax year) must file Form 4506-T to request a return transcript.

Note: If you are unsure of which type of transcript you need, request the Record of Account, as it provides the most detailed information.

Customer File Number. The transcripts provided by the IRS have been modified to protect taxpayers' privacy. Transcripts only display partial personal information, such as the last four digits of the taxpayer's Social Security Number. Full financial and tax information, such as wages and taxable income, are shown on the transcript.

An optional Customer Fife Number field is available to use when requesting a transcript. This number will print on the transcript, See Line 5 instructions for specific requirements. The customer file number is an optional field and not required.

Tip. Use Form 4506, Request for Copy of Tax Return, to request copies of tax returns.

Automated transcript request, You can quickly request transcripts by using our automated self-help service tools. Please visit us at IRS.gov and click on "Get a Tax Transcript..." under "Tools" or call 1-800-808-9946.

Where to file. Mall or fax Form 4506-T to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual transcripts (Form 1040 series and Form W-2) and one for all other transcripts.

If you are requesting more than one transcript or other product and the chart below shows two different addresses, send your request to the address based on the address of your most recent return.

### Chart for individual transcripts (Form 1040 series and Form W-2 and Form 1099)

If you filed an individual return and lived in:

Mail or fax to:

Alabama, Kentucky, Louislana, Mississippl, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address

Internal Revenue Service RAIVS Team Stop 6716 AUSC Austin, TX 73301

855-687-9604

Aiaska, Arizona, Arkansas, California, Colorado, Hawail, Idaino, Illinois, Indiana, Iowa, Kensas, Michigan, Minnesota, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Utah, Washington, Wisconsin, Wyoming

Internal Revenue Service RAIVS Team Stop 37106 Fresno, CA 93888

855-800-8105

Connecticut, Delaware, District of Columbia, Fiorida, Georgia, Malne, Maryland, Massachusetts, Missouri, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Fihode Island, South Carolina, Vermont, Virginia, West Virginia

Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999

855-821-0094

#### Chart for all other transcripts

If you lived in or your business was

Mail or fax to:

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Connecticut, Delaware, District of Columbia, Florida, Georgia, Hawali, Idaho, Illinois, Indiana, Iowa, Kansas, Kentucky, Louislana, Maryland, Michigan, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Jersey, New Mexico, North Carolina, North Dakota, Ohio, Oklahoma, Oregon, Rhode Island, South Carolina, South Dakota, Tennessee, Texas, Utah, Virginia, Washington, West Virginia, Wisconsin. Wyoming, a foreign country,

Internal Revenue Service RAIVS Team P.O. Box 9941 Mail Stop 6734 Ogden, UT 84409

855-298-1145

Maine, Massachusetts, New Hampshire, New York, Pennsylvania, Vermont

American Samoa, Puerto

Northem Mariana Islands, the U.S. Virgin Islands,

A.P.O. or F.P.O. address

Commonwealth of the

Rico, Guam, the

Internal Revenue Service RAIVS Team Stop 6705 S-2 Kansas City, MO 64999

855-821-0094

Line 1b. Enter your employer Identification number (EIN) if your request relates to a business return. Otherwise, enter the first social security number (SSN) or your individual taxpayer identification number (ITIN) shown on the return. For example, if you are requesting Form 1040 that Includes Schedule O (Form 1040), enter your SSN.

Line 3. Enter your current address. If you use a P.O. box, include it on this line.

Line 4. Enter the address shown on the last return filed if different from the address entered on line 3.

Note: If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822. Change of Address. For a business address, file Form 8822-B, Change of Address or Responsible Party — Business.

Line 5b. Enter up to 10 numeric characters to create a unique customer file number that will appear on the transcript. The customer file number should not contain an SSN.

Completion of this line is not required.

Note, if you use an SSN, name or combination of both, we will not input the information and the customer file number will reflect a generic entry of "989999999" on the transcript.

Line 6. Enter only one tax form number per request. Signature and date, Form 4506-T must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive form 4506-T within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines are completed before signing.



You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

Individuals. Transcripts of jointly filed tax returns may be furnished to elthis spouse. Only one signature is required. Sign Form 4506-T exactly as your name appeared on the original return. If you changed your name, also sign your ourrent name.

Corporations. Generally, Form 4506-T can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506-T but must provide documentation to support the requester's right to receive the information.

Partnerships. Generally, Form 4506-T can be signed by any person who was a member of the partnership during any part of the tax period requested on line 9.

All others. See section 6103(e) if the taxpayer has clied, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer. Note: if you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

Documentation. For entitles other than Individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

Signature by a representative. A representative can sign-Form 4508-T-for a taxpayer only if the taxpayer has specifically delegated this authority to the representative on Form 2848, line 5. The representative must attach Form 2848 showing the delegation to Form 4806-T.

Privacy Act and Paperwork Reduction Act Notice. We ask for the Information on this form to establish your right to gain access to the requested tax information under the Internal Revenue Code. We need this information to properly identify the tax information and respond to your request. You are not required to request any transcript; if you do request a transcript, sections 6103 and 6109 and their regulations require you to provide this information, including your SSN or EIN. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonweaths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMS control number. Books or redords relating to a form or its instructions must be retained as long as their contents may become material in the administration of any internal Revenue law, Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506-T will vary depending on individual circumstances. The estimated average time is: Learning about the law or the form, 10 min.; Preparing the form, 12 min.; and Copying, assembling, and sending the form to the IRS, 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506-T simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service Tax Forms and Publications Division 1111 Constitution Ave. NW, IR-6526 Washington, DC 20224

Do not send the form to this address, instead, see Where to tile on this page.