

Tax Relief Program for Elderly & Disabled Homeowners

The State of Connecticut and the Town of Somers offers a tax relief program for elderly and totally disabled persons who meet certain income parameters. Tax Relief takes the form of a credit that appears on an eligible person's real estate tax bill. The credit amount is based upon graduated levels of income and a person's marital status.

Applications for tax credits are filed with the Assessor of the town in which the elderly or totally disabled person resides. The filing period is between February 1st and May 15th. After initially being granted tax relief, claimants must reapply for subsequent qualification on a biennial basis.

In order to qualify for a tax credit on the July 2009 tax bill, the homeowner or spouse must have been 65 years of age by December 31, 2008 or be totally disabled.

The applicant must own the home on or before October 1, 2008 and reside at the property for which tax relief is sought, or must hold tenancy for life use.

The claimant's 2008 qualifying income cannot exceed \$37,300. Qualifying income is defined as adjusted gross income and tax-exempt interest plus any other income not included in such adjusted gross income.

If a claimant filed a Federal Income Tax Return for 2008, a copy must be presented to the Assessor. If a Federal Tax Return is not filed, proof of income such as 1099 Interest, 1099 Dividend, and Social Security 1099, must be presented.

Additional Veteran's Benefits

The Town also provides an additional exemption of \$5,000 of assessed property value to qualified veterans or the surviving spouse of a veteran. In order to qualify for this additional veteran's benefit, application must be made with the Assessor between February 1, 2009 and October 1, 2009 and every two years thereafter. Income from all sources for 2008 cannot exceed \$30,500 for single applicants and \$37,300 for married applicants.

If you have any questions, please call Pat Juda at 763-8202.