



## **Tax Relief Program for Elderly and Disabled Homeowners**

The State of Connecticut and the Town of Somers offer 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's Office of the town in which the elderly or totally disabled person resides. **The filing period is between February 1<sup>st</sup> and May 15<sup>th</sup>.** 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 2023 tax bill, the homeowner or spouse must have been 65 years of age by December 31, 2022 or be totally disabled.

The applicant must own their home on or before October 1, 2022 and reside at the property for which relief is sought or must hold tenancy for life use while residing in the home.

The claimant's 2022 qualifying income cannot exceed \$49,100 if married or \$40,300 if single/widowed. Qualifying income is defined as adjusted gross income and tax exempt interest plus any other income not included in such adjusted gross income such as Social Security income.

If a claimant filed a Federal Tax Return for 2022, a copy must be presented to the Assessor's Office. 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 of Somers 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 benefit, application must be made with the Assessor between February 1, 2022 and October 1, 2022 and every two years thereafter. Income from all sources for 2022 cannot exceed \$40,300 for single applicants and \$49,100 for married applicants.

If you have any questions, please call Karen Neal at 860-763-8202.