Village of Babylon
Application for Partial Tax Exemption for Real Property of Senior Citizens
Household Income limit: $30,000 (For 2017-2018 Tax year)

Please note that all property owners on the deed must be 65 years or older to qualify for this exemption). You must submit the following along with the completed application:

- Copies of driver's license or birth certificate for all owner's listed on deed
- Copies of 2015 federal *and state* income tax returns- if state return not filed we also require proof of residency (utility bills, car registration, etc.)

  As directed by New York State law regarding tax exemptions, the Village of Babylon can request your tax return or verification of non-filing from the IRS.

  - **You must complete form 4506-T (#1-4) enclosed, and submit with your application**

- Copies of 2015 Social Security Year-End statements (SSA-1099)
- Copies of 2015 year-end statements showing all interest, dividend, and/or capital gains income (Attach all 1099-INT and/or 1099 DIV)
- Copies of 2015 year-end statements showing all annuity, pension, and/or retirement distribution income (Attach 1099R)
- Salaries or wages including self employment (W 2's)
- Rental income on all properties
- Documentation for alimony, support, and/or unemployment income
- Income from Estates or Trusts
- Documentation for any additional income

If the property is held in trust, you must bring in the original of the trust. We will photo copy the pages we require to keep on file. You must be named as a beneficiary during your lifetime. If not, all named as owners of the trust must qualify – income and age 65

Your signed application along with the required proofs of income must be filed in this office ***no later than December 30, 2016***; *however we **suggest filing by November 7th, 2016,*** so we have ample time to reach you in the event we need additional information. Please be advised that the **maximum annual income *of the household* is $30,000**. We urge you to file at your earliest convenience, as last minute filing could cause a delay of exemption or denial of your application if it is incomplete or lacks the required information.

If you have any questions concerning this matter, please do not hesitate to contact this office at 669-1500.

VILLAGE OF BABYLON
FOR PARTIAL TAX EXEMPTION FOR REAL PROPERTY
OF SENIOR CITIZENS

INCOME LIMIT $30,000
TAX YEAR 2017

NAME OF ALL OWNERS	BIRTH DATE	MARITAL STATUS	SOCIAL SECURITY#	MAILING ADDRESS

1. Name of Spouse (not listed under Owners)____

2. Telephone No# Day_________________________ Evening____________________________

3. Location of Property / Street Address: ____

4. Tax Map # / District, Section, Block and Lot____

5. Do you or any owners own additional property(ies) in or out of New York State? YES_____NO____
   Address(s)____

6. Proof of Age:____

7. Date Applicant(s) took ownership of the property:______Latest Deed of Record (attached)_________

8. Is property held in Trust?____________ If so, attach entire Trust Document___________________

9. Do all owners presently reside on premises? YES___________ NO _________If answer is NO, is an owner receiving medical care as an in-patient in health care facility? YES___________ NO________
   If YES, specify anticipated length of stay and return home date______________________________

10. Is any portion of the property used for other than residential purpose (commercial, business, vacant land)? YES_________ NO_________
    If Yes, explain such use and describe portion that is used.__________________________________

11. Did Owner(s) or Spouse file a Federal and NY State Income Tax return for previous year? _________
    YES_______ NO_______
    If Yes, attach copies of Tax Returns with all Year-end Statements and Schedules.

12. Does a child or (children) including those of tenants, reside on the property and attend public school.
    YES____ NO______ Name of School / Grade____

INCOME ELIGIBILTY WORKSHEET: Verification of all Taxable & Non-Taxable Income must be submitted with application including year-end statements & necessary documentation. Information will be verified.

SOURCES OF INCOME FROMALL OWNERS & OWNER'S SPOUSE		
Gross Social Security: including Medicare (Attach copies of SSA-1099)		
Salary or Wages: (Attach W-2's, including self-employment)		
Business Income: (Attach Schedule C, S-Corp Tax Return with K-1 or Partner Tax Return)		
Taxable & Non-Taxable Interest: (Attach all 1099-INT & year-end statements for non-taxable interest)		
Taxable & Non-Taxable Dividends: (Attach all 1099-DIV & year-end statements for non-taxable dividends)		
IRA Earnings: (Interest, dividends or capital gains earned) DO NOT include the amount of your distribution.		
Pensions, Annuities & retirement Plans: (Attach 1099R statements and include taxable & non-taxable pensions)		
VA & or VA Disability Pension(s) or Surviving Spouse VA Pension: (Attach award letter)		
Capital Gains: (Include tax-deferred capital gain distribution statements from financial institutions)		
Rental Income: (Received from all properties)		
Disability/ Workers Compensation Payments/Unemployment Benefits:		
Income from Estates or Trusts: (Attach the Estate or Trust's Income Tax Return)		
Alimony and/or Child Support Payment Received		
Money from others living in house toward maintenance, support or expenses		
Other Sources of Income:		
TOTALS OF ALL INCOME	$	$
GRAND TOTAL	$	

I (We) certify that the all the above information made on this application is true and correct and that the property listed above is my (our) legal residence. I (We) understand it is my (our) obligation to provide any documentation of eligibility that is requested and to notify the Assessor if I (We) relocate to any primary residence. I (We) understand that any willful false statement of fact will be grounds for disqualification from further exemption for a period of five(5) years and a fine as set forth in NY State Real Property Tax Law 467.

SIGNATURE (S) ALL OWNERS Date

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SIGNATURE (S) ALL OWNERS Date

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Form **4506-T**
(Rev. September 2015)
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 Form 4506-T to order a transcript or other return information free of charge. See the product list below. 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 1-800-908-9946. If you need a copy of your return, use **Form 4506, Request for Copy of Tax Return.** There is a fee to get a copy of your return.

1a Name shown on tax return. If a joint return, enter the name shown first.	**1b First social security number on tax return, individual taxpayer identification number, or employer identification number (see instructions)**
2a If a joint return, enter spouse's name shown on tax return.	**2b Second social security number or individual taxpayer identification number if joint tax return**

3 Current name, address (including apt., room, or suite no.), city, state, and ZIP code (see instructions)

4 Previous address shown on the last return filed if different from line 3 (see instructions)

5 If the transcript or tax information is to be mailed to a third party (such as a mortgage company), enter the third party's name, address, and telephone number.

Village of Babylon Village Clerk's Office 153 W. Main Street, Babylon, NY 11702 (631) 669-1500

Caution: If the tax transcript is being mailed to a third party, ensure that you have filled in lines 6 through 9 before signing. Sign and date the form once you have filled in these lines. Completing these steps helps to protect your privacy. Once the IRS discloses your tax transcript to the third party listed on line 5, the IRS has no control over what the third party does with the information. If you would like to limit the third party's authority to disclose your transcript information, you can specify this limitation in your written agreement with the third party.

6 Transcript requested. Enter the tax form number here (1040, 1065, 1120, etc.) and check the appropriate box below. Enter only one tax form number per request. ▶ 1040

a Return Transcript, which includes most of the line items of a tax return as filed with the IRS. A tax return transcript does not reflect changes made to the account after the return is processed. Transcripts are only available for the following returns: Form 1040 series, Form 1065, Form 1120, Form 1120-A, Form 1120-H, Form 1120-L, and Form 1120S. Return transcripts are available for the current year and returns processed during the prior 3 processing years. Most requests will be processed within 10 business days ☐

b Account Transcript, which contains information on the financial status of the account, such as payments made on the account, penalty assessments, and adjustments made by you or the IRS after the return was filed. Return information is limited to items such as tax liability and estimated tax payments. Account transcripts are available for most returns. Most requests will be processed within 10 business days ☐

c 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 ☐

7 Verification of Nonfiling, which is proof from the IRS that you **did not** file a return for the year. Current year requests are only available after June 15th. There are no availability restrictions on prior year requests. Most requests will be processed within 10 business days ☐

8 Form W-2, Form 1099 series, Form 1098 series, or Form 5498 series transcript. The IRS can provide a transcript that includes data from these information returns. State or local information is not included with the Form W-2 information. The IRS may be able to provide this transcript information for up to 10 years. Information for the current year is generally not available until the year after it is filed with the IRS. For example, W-2 information for 2011, filed in 2012, will likely not be available from the IRS until 2013. If you need W-2 information for retirement purposes, you should contact the Social Security Administration at 1-800-772-1213. Most requests will be processed within 10 business days ☐

Caution: If you need a copy of Form W-2 or Form 1099, you should first contact the payer. To get a copy of the Form W-2 or Form 1099 filed with your return, you must use Form 4506 and request a copy of your return, which includes all attachments.

9 Year or period requested. Enter the ending date of the year or period, using the mm/dd/yyyy format. If you are requesting more than four years or periods, you must attach another Form 4506-T. For requests relating to quarterly tax returns, such as Form 941, you must enter each quarter or tax period separately. 12 / 31 / 2015 | / / | / / | / /

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

Signature of taxpayer(s). I declare that I am either the taxpayer whose name is shown on line 1a or 2a, or a person authorized to obtain the tax information requested. If the request applies to a joint return, at least one spouse must sign. If signed by a corporate officer, 1 percent or more shareholder, partner, managing member, guardian, tax matters partner, executor, receiver, administrator, trustee, or party other than the taxpayer, I certify that I have the authority to execute Form 4506-T on behalf of the taxpayer. **Note:** For transcripts being sent to a third party, this form must be received within 120 days of the signature date.

☐ **Signatory attests that he/she has read the attestation clause and upon so reading declares that he/she has the authority to sign the Form 4506-T.** See instructions.

Phone number of taxpayer on line 1a or 2a

Sign Here

▶ **Signature** (see instructions) Date

▶ **Title** (if line 1a above is a corporation, partnership, estate, or trust)

▶ **Spouse's signature** Date