

**TOWN OF BABYLON DEPARTMENT OF ASSESSMENT
FIRST TIME AGED APPLICATION INSTRUCTION SHEET - PLEASE READ CAREFULLY**

IF YOU RECEIVED A STAR EXEMPTION ON THIS PROPERTY FOR THE 2015-16 TAX YEAR, THIS APPLICATION WILL ALSO SERVE AS AN APPLICATION FOR THE ENHANCED STAR EXEMPTION. IF NOT, YOU MAY BE ELIGIBLE FOR THE ENHANCED STAR CREDIT, WHICH IS PROVIDED IN THE FORM OF A CHECK. TO RECEIVE AN ENHANCED STAR CHECK, YOU MUST REGISTER FOR IT. FOR MORE INFORMATION, VISIT WWW.TAX.NY.GOV OR CALL (518) 457-2036.

Filing Deadline: **March 1, 2018** – Applications received after filing deadline will be denied.

Application Accepted: In Person: 9:00 a.m. – 4:30 p.m. Monday through Friday

 By Mail: Must be **postmarked** no later than March 1, 2018
 If mailing, consider using certified/return receipt

Requirements:

1. Must be your primary residence and you must be the recorded owner.
2. All owners must be 65 or older by December 31, 2018. For property owned by a married couple or siblings, only one must be 65 or older by that date.
3. Combined **GROSS** income of **all** owners and spouse(s) cannot exceed **\$37,400**.

The Town of Babylon requires the following information be attached to and submitted with your COMPLETED AND SIGNED application:

Photocopies of:

1. **To prove ownership you must submit one of the following:**
 - a) most recent **recorded** deed
 - b) certificate of shares if you reside in a co-op
 - c) mobile home – bill of sale including serial number(Note – if ownership for any of above is in a “trust” must provide copy of trust)

2. **To prove age you must provide one of the following for each applicant:**
 - a) current driver’s license or NYS non-driver ID
 - b) birth certificate
 - c) passport

3. **To prove residency you must provide one of the following for each applicant and spouse:**
 - a) current driver’s license or NYS non-driver ID
 - b) current car registration

4. If spouse is deceased and still listed as an owner, a copy of Death Certificate

(OVER)

5. If divorced or legally separated, a copy of the divorce decree or legal separation
6. If you are claiming unreimbursed medical or prescription expenses, copies of itemized lists from physician(s) and/or pharmacist(s) must be submitted **at time of filing.** Cancelled checks and individual receipts will not be deducted.
7. If you are receiving assistance from Social Services please provide a copy of your **Notice of Decision** for proof of benefits.

To Prove **GROSS INCOME** you must submit **PHOTOCOPIES** of the following for the **2017** tax year
(No originals please, we are unable to return them to you)

1. **ENTIRE** Federal Income Tax Return for **2017**, including **all** schedules and **all** 1099's.
2. Social Security 1099(s) for **2017**, as well as all pensions including non-taxable pensions such as railroad, police, fireman, workers compensation and private disability.
3. **IRA** end of year **interest or earnings summary**, showing interest earned for **2017**, (i.e. found in your final yearly statement, snapshot or performance summary, etc.) for **all** IRA accounts, even if you do not take a distribution. (Note: the interest or earnings is **not** found on your tax return, nor is it found on your 1099-R distribution statement.)
4. Copy of your most recent (**2017**) mortgage(s), reverse mortgage or home equity loan statement.
5. Proof of any rental or business income.
6. Applicants must report any income towards household expenses from anyone, including family members, friends or tenants.

NOTE: If your income exceeds the locally applicable income ceiling, in order to be considered for the Enhanced Star Exemption, you will be required to submit a copy of your 2016 TAX RETURN. For Enhanced STAR income will be based on federal adjusted gross income less distributions from individual retirement accounts. Therefore it is recommended that you supply **both 2016 and 2017** tax returns with your application

Now Available: An **optional** third party notice form is enclosed which may be used to request that a notice be sent to an adult third party to assist you in preparing and submitting the application for this exemption. Should you wish to do so, please return the form with your application for implementation beginning in **2019**.

IF YOU ARE NOT REQUIRED TO FILE A TAX RETURN, YOU MUST SUPPLY PHOTOCOPIES OF ALL SOURCES OF INCOME, INCLUDING ALL 1099'S – WE MAY REQUIRE YOU TO SIGN PROOF OF NON-FILING, IRS FORM 4506-T WHICH WILL THEN BE SUBMITTED TO THE IRS FOR VERIFICATION.

BE SURE TO SUBMIT YOUR COMPLETED APPLICATION WITH ALL REQUIRED DOCUMENTATION BY MARCH 1, 2018

INCOMPLETE APPLICATIONS WILL BE DENIED