

ELDERLY EXEMPTION APPLICATION WORKSHEET ATTACHMENTS
(MUST be attached to Elderly Exemption form)

Please attach the following to the application:

INCOME:

Social Security: Form SSA-1099 – Social Security Benefit Statement for 2011

Pension Payment: 1099-R

Wages: W-2 (Income Tax Return)

Dividend Income: Common Share Dividend Payment

Interest Income: 1099-INT

Annuity Income: Annuity Payment

IRA Distribution: (usually on bank statement)

Financial Support from Others:

Income from Rental Real Estate:

Income Tax Return for 2011: Copy of the income tax return and **all documents** showing **interest income, pensions, wages, dividend income, annuity and IRA.**

ASSETS:

Checking/Savings Account Balance: Bank statement(s) as close to 12/31/2011
(example: 01/13/2012 is OK)

CD(s): value should be on bank statement

IRA(s): value should be on bank statement

Stocks/Bonds: document showing face value

Annuity: document showing face value

If you have any questions or wish to make an appointment, please call me at 448-1499.

Susan E. Baker
Assessing Clerk