



GL 2023

AB \_\_\_\_\_

UID \_\_\_\_\_

DF \_\_\_\_\_

TOTAL INCOME \_\_\_\_\_

PERCENTAGE \_\_\_\_\_

**Application for Elderly Tax Assistance for Abatement, Deferment or Freeze**

**Weston Code of Ordinances Chapter 179, Article IV**

**Applications must be received by the Tax Collector's Office no later than May 15, 2024**

Name \_\_\_\_\_

SS# \_\_\_\_\_

Name \_\_\_\_\_

SS# \_\_\_\_\_

Property Location \_\_\_\_\_

Filing Status: Married \_\_\_\_\_

Mailing Address \_\_\_\_\_

Unmarried \_\_\_\_\_

Email \_\_\_\_\_

Telephone \_\_\_\_\_

---

**Please note: All questions must be answered. Incomplete applications may result in denial of benefits.**

---

1. Date of Birth \_\_\_\_\_

2. Is there a co-owner other than spouse? Yes \_\_\_\_\_ No \_\_\_\_\_

3. Do you share ownership with anyone else? Yes \_\_\_\_\_ No \_\_\_\_\_

If yes Name \_\_\_\_\_

Their % of ownership \_\_\_\_\_

4. I and/or my spouse was 65 or older on December 31, 2023 or I was 60 on that date and I am the surviving spouse of a taxpayer qualified for tax relief under this ordinance at the time of his/her death. Yes \_\_\_\_\_ No \_\_\_\_\_
5. I have resided and paid real estate taxes on a residence in Weston of 1 year prior to this application. Yes \_\_\_\_\_ No \_\_\_\_\_
6. Is the property your legal residence and do you occupy your residence more than 183 days each year? Yes \_\_\_\_\_ No \_\_\_\_\_
7. My property taxes are paid. I am not delinquent. Taxpayer must be current as of May 15<sup>th</sup> to be eligible for benefits. Yes \_\_\_\_\_ No \_\_\_\_\_
8. I certify that I have applied for State Tax Relief with the Assessor for which I may be eligible. Yes \_\_\_\_\_ No \_\_\_\_\_

**Checklist of what you need to submit with this form.**

Did you file a Federal Tax Return last year? Yes \_\_\_\_\_ No \_\_\_\_\_

1. Please attach a copy of your Federal Income Tax Return for 2023. If you file separately from your spouse, attach for each.
2. Copies of all untaxed income.
  - A. Untaxed Social Security Benefits
  - B. Untaxed IRA Distributions
  - C. Untaxed Pensions and Annuities

**Please note: You are being asked to sign IRS Form 4506 (attached to this application) that allows the town to request a copy of your 2023 Federal Tax return if deemed necessary.**

# TOTAL INCOME

List your total income from last calendar year below:

Total Income – Form 1040 Line 9 \_\_\_\_\_

Tax Exempt Interest --Line 2A \_\_\_\_\_

Untaxed IRA Distributions—Line 4A \_\_\_\_\_

Untaxed Pensions & Annuities-Line 5A \_\_\_\_\_

Untaxed Social Security –Line 6A \_\_\_\_\_

Any Other Income --Line 8 \_\_\_\_\_

Total All of the Above \_\_\_\_\_

## NET WORTH

3. Net Worth: include fair market value on ALL assets, real and liquid. Please include ALL supporting documents. We will obtain the FMV of your property from the Assessor.

A. Fair Market Value of Real Property \_\_\_\_\_

Minus Mortgage \_\_\_\_\_

Loans \_\_\_\_\_

Total \_\_\_\_\_

B. Bank accounts (recent month statement for checking, savings and any retirement accounts)

---

---

---

C. Stocks and Bonds

---

---

D. Any Other Assets

---

Total Net Worth \_\_\_\_\_

PLEASE BE SURE TO SIGN AND DATE BELOW.  
YOU SHOULD CONTACT US WITH ANY QUESTIONS BY PHONE OR EMAIL.  
THERE WILL BE NO APPOINTMENTS THIS YEAR.

Tax office telephone: 203-222-2696 or 2697

Email: [cneblett@westonct.gov](mailto:cneblett@westonct.gov) or [jmorse@westonct.gov](mailto:jmorse@westonct.gov)

\*I, \_\_\_\_\_ do swear or affirm under penalty of perjury that the information contained in this application has been examined by me and to the best of my knowledge and belief is complete and the statements made are true and correct. I acknowledge and understand that, pursuant to Weston Code 179-30(B), falsely reporting total income or information in connection with this request for tax relief may result in denial or loss of the benefits provided pursuant to this ordinance

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

Revised 2/8/2024

### Request for Copy 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, visit [www.irs.gov/form4506](http://www.irs.gov/form4506).

**Tip: Get faster service:** Online at [www.irs.gov](http://www.irs.gov), **Get Your Tax Record** (Get Transcript) or by calling 1-800-908-9946 for specialized assistance. We have teams available to assist. **Note:** Taxpayers may register to use **Get Transcript** to view, print, or download the following transcript types: **Tax Return Transcript** (shows most line items including Adjusted Gross Income (AGI) from your original Form 1040-series tax return as filed, along with any forms and schedules), **Tax Account Transcript** (shows basic data such as return type, marital status, AGI, taxable income and all payment types), **Record of Account Transcript** (combines the tax return and tax account transcripts into one complete transcript), **Wage and Income Transcript** (shows data from information returns we receive such as Forms W-2, 1099, 1098 and Form 5498), and **Verification of Non-filing Letter** (provides proof that the IRS has no record of a filed Form 1040-series tax return for the year you request).

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

**Caution:** If the tax return is being sent to the third party, ensure that lines 5 through 7 are completed before signing. (see instructions).

6 Tax return requested. Form 1040, 1120, 941, etc. and all attachments as originally submitted to the IRS, including Form(s) W-2, schedules, or amended returns. Copies of Forms 1040, 1040A, and 1040EZ are generally available for 7 years from filing before they are destroyed by law. Other returns may be available for a longer period of time. Enter only one return number. If you need more than one type of return, you must complete another Form 4506. ▶ \_\_\_\_\_

**Note:** If the copies must be certified for court or administrative proceedings, check here

7 Year or period requested. Enter the ending date of the tax year or period using the mm/dd/yyyy format (see instructions).

_ / _ / _	_ / _ / _	_ / _ / _	_ / _ / _
_ / _ / _	_ / _ / _	_ / _ / _	_ / _ / _

8 Fee. There is a \$30 fee for each return requested. Full payment must be included with your request or it will be rejected. Make your check or money order payable to "United States Treasury." Enter your SSN, ITIN, or EIN and "Form 4506 request" on your check or money order

a Cost for each return . . . . .	\$
b Number of returns requested on line 7 . . . . .	
c Total cost. Multiply line 8a by line 8b . . . . .	\$

9 If we cannot find the tax return, we will refund the fee. If the refund should go to the third party listed on line 5, check here

**Caution:** Do not sign this form unless all applicable lines have been complete

**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 return 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 on behalf of the taxpayer. **Note:** This form must be received by IRS 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. See instructions

Phone number of taxpayer on line 1a or 2a

<b>Sign Here</b>	▶ Signature (see instructions)	Date
	▶ Print/type name	Title (if line 1a above is a corporation, partnership, estate, or trust)
	▶ Spouse's signature	Date
	▶ Print/type name	

Section references are to the Internal Revenue Code unless otherwise noted.

## Future Developments

For the latest information about Form 4506 and its instructions, go to [www.irs.gov/form4506](http://www.irs.gov/form4506).

## General Instructions

**Caution:** Do not sign this form unless all applicable lines, including lines 5 through 7, have been completed.

**Designated Recipient Notification.** Internal Revenue Code, Section 6103(c), limits disclosure and use of return information received pursuant to the taxpayer's consent and holds the recipient subject to penalties for any unauthorized access, other use, or redisclosure without the taxpayer's express permission or request.

**Taxpayer Notification.** Internal Revenue Code, Section 6103(c), limits disclosure and use of return information provided pursuant to your consent and holds the recipient subject to penalties, brought by private right of action, for any unauthorized access, other use, or redisclosure without your express permission or request.

**Purpose of form.** Use Form 4506 to request a copy of your tax return. You can also designate (on line 5) a third party to receive the tax return.

**How long will it take?** It may take up to 75 calendar days for us to process your request.

**Where to file.** Attach payment and mail Form 4506 to the address below for the state you lived in, or the state your business was in, when that return was filed. There are two address charts: one for individual returns (Form 1040 series) and one for all other returns.

If you are requesting a return for more than one year or period and the chart below shows two different addresses, send your request based on the address of your most recent return.

## Chart for individual returns (Form 1040 series)

If you filed an individual return and lived in:

Mail to:

Alabama, Arkansas, Florida, Georgia, Louisiana, Mississippi, North Carolina, Oklahoma, South Carolina, Tennessee, Texas, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address

Internal Revenue Service  
RAVS Team  
Stop 6716 AUSC  
Austin, TX 73301

Delaware, Illinois, Indiana, Iowa, Kentucky, Maine, Massachusetts, Minnesota, Missouri, New Hampshire, New Jersey, New York, Vermont, Virginia, Wisconsin

Internal Revenue Service  
RAVS Team  
Stop 6705 S-2  
Kansas City, MO 64999

Alaska, Arizona, California, Colorado, Connecticut, District of Columbia, Hawaii, Idaho, Kansas, Maryland, Michigan, Montana, Nebraska, Nevada, New Mexico, North Dakota, Ohio, Oregon, Pennsylvania, Rhode Island, South Dakota, Utah, Washington, West Virginia, Wyoming

Internal Revenue Service  
RAVS Team  
P.O. Box 9941  
Mail Stop 6734  
Ogden, UT 84409

## Chart for all other returns

For returns not in Form 1040 series, if the address on the return was in:

Mail to:

Connecticut, Delaware, District of Columbia, Georgia, Illinois, Indiana, Kentucky, Maine, Maryland, Massachusetts, Michigan, New Hampshire, New Jersey, New York, North Carolina, Ohio, Pennsylvania, Rhode Island, South Carolina, Tennessee, Vermont, Virginia, West Virginia, Wisconsin

Internal Revenue Service  
RAVS Team  
Stop 6705 S-2  
Kansas City, MO 64999

Alabama, Alaska, Arizona, Arkansas, California, Colorado, Florida, Hawaii, Idaho, Iowa, Kansas, Louisiana, Minnesota, Mississippi, Missouri, Montana, Nebraska, Nevada, New Mexico, North Dakota, Oklahoma, Oregon, South Dakota, Texas, Utah, Washington, Wyoming, a foreign country, American Samoa, Puerto Rico, Guam, the Commonwealth of the Northern Mariana Islands, the U.S. Virgin Islands, or A.P.O. or F.P.O. address

Internal Revenue Service  
RAVS Team  
P.O. Box 9941  
Mail Stop 6734  
Ogden, UT 84409

## Specific Instructions

**Line 1b.** Enter the social security number (SSN) or individual taxpayer identification number (ITIN) for the individual listed on line 1a, or enter the employer identification number (EIN) for the business listed on line 1a. For example, if you are requesting Form 1040 that includes Schedule C (Form 1040), enter your SSN.

**Line 3.** Enter your current address. If you use a P.O. box, please include it on this line 3.

**Line 4.** Enter the address shown on the last return filed if different from the address entered on line 3.

**Note.** If the addresses on lines 3 and 4 are different and you have not changed your address with the IRS, file Form 8822, Change of Address, or Form 8822-B, Change of Address or Responsible Party — Business, with Form 4506.

**Line 7.** Enter the end date of the tax year or period requested in mm/dd/yyyy format. This may be a calendar year, fiscal year or quarter. Enter each quarter requested for quarterly returns. Example: Enter 12/31/2018 for a calendar year 2018 Form 1040 return, or 03/31/2017 for a first quarter Form 941 return.

**Signature and date.** Form 4506 must be signed and dated by the taxpayer listed on line 1a or 2a. The IRS must receive Form 4506 within 120 days of the date signed by the taxpayer or it will be rejected. Ensure that all applicable lines, including lines 5 through 7, are completed before signing.



You must check the box in the signature area to acknowledge you have the authority to sign and request the information. The form will not be processed and returned to you if the box is unchecked.

**Individuals.** Copies of jointly filed tax returns may be furnished to either spouse. Only one signature is required. Sign Form 4506 exactly as your name appeared on the original return. If you changed your name, also sign your current name.

**Corporations.** Generally, Form 4506 can be signed by: (1) an officer having legal authority to bind the corporation, (2) any person designated by the board of directors or other governing body, or (3) any officer or employee on written request by any principal officer and attested to by the secretary or other officer. A bona fide shareholder of record owning 1 percent or more of the outstanding stock of the corporation may submit a Form 4506 but must provide documentation to support the requester's right to receive the information.

**Partnerships.** Generally, Form 4506 can be signed by any person who was a member of the partnership during any part of the tax period requested on line 7.

**All others.** See section 6103(e) if the taxpayer has died, is insolvent, is a dissolved corporation, or if a trustee, guardian, executor, receiver, or administrator is acting for the taxpayer.

**Note:** If you are Heir at law, Next of kin, or Beneficiary you must be able to establish a material interest in the estate or trust.

**Documentation.** For entities other than individuals, you must attach the authorization document. For example, this could be the letter from the principal officer authorizing an employee of the corporation or the letters testamentary authorizing an individual to act for an estate.

**Signature by a representative.** A representative can sign Form 4506 for a taxpayer only if this authority has been specifically delegated to the representative on Form 2848, line 5a. Form 2848 showing the delegation must be attached to Form 4506.

## Privacy Act and Paperwork Reduction Act

**Notice.** We ask for the information on this form to establish your right to gain access to the requested return(s) under the Internal Revenue Code. We need this information to properly identify the return(s) and respond to your request. If you request a copy of a tax return, sections 6103 and 6109 require you to provide this information, including your SSN or EIN, to process your request. If you do not provide this information, we may not be able to process your request. Providing false or fraudulent information may subject you to penalties.

Routine uses of this information include giving it to the Department of Justice for civil and criminal litigation, and cities, states, the District of Columbia, and U.S. commonwealths and possessions for use in administering their tax laws. We may also disclose this information to other countries under a tax treaty, to federal and state agencies to enforce federal nontax criminal laws, or to federal law enforcement and intelligence agencies to combat terrorism.

You are not required to provide the information requested on a form that is subject to the Paperwork Reduction Act unless the form displays a valid OMB control number. Books or records relating to a form or its instructions must be retained as long as their contents may become material in the administration of any Internal Revenue law. Generally, tax returns and return information are confidential, as required by section 6103.

The time needed to complete and file Form 4506 will vary depending on individual circumstances. The estimated average time is: **Learning about the law or the form,** 10 min.; **Preparing the form,** 16 min.; and **Copying, assembling, and sending the form to the IRS,** 20 min.

If you have comments concerning the accuracy of these time estimates or suggestions for making Form 4506 simpler, we would be happy to hear from you. You can write to:

Internal Revenue Service  
Tax Forms and Publications Division  
1111 Constitution Ave. NW, IR-6526  
Washington, DC 20224.

Do not send the form to this address. Instead, see **Where to file** on this page.