



Incorporated 1787

## Office of Tax Collector

### Applications for Elderly Tax Relief

The Tax Collector is currently accepting applications for the Abatement, Deferment and Freeze programs through May 15, 2023 for the upcoming Grand List year. You must apply every year for all programs. You can request an application from the Tax Collector's office.

Please call 203-222-2696 or 2697 or email [cneblett@westonct.gov](mailto:cneblett@westonct.gov) or [nohavec@westonct.gov](mailto:nohavec@westonct.gov).

You will be required to attach a copy of your completed 1040 and all back up material showing all income sources including your 1099s with your application. You also need to provide documentation about your net worth. Examples are: any mortgage or loans on your home and any checking, savings and retirement accounts.

After completing your application, you can mail it to: Tax Collector 56 Norfield Road Weston, CT 06883. You may put your application in the drop box located on the library side entrance to the Town Hall. You can email your application. Please be sure you have included copies of all supporting documents. Appointments for help over the phone can be made with us.

To qualify, you must be age 65 by the end of December 2022. You must not be delinquent on your taxes by the closing date of May 15, 2023. Income cannot exceed \$49,000 for Abatement; \$125,000 for Deferment and \$100,000 for Freeze. Net worth cannot exceed \$1,000,000 for Abatement. There is no net worth ceiling for Deferment or Freeze programs. Benefit will apply to only the first \$400,000 of your assessment for Abatement and Deferment and for the first \$800,000 of assessment for the Freeze.



GL 2022

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, 2023**

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, 2022 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 2022. 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 may be asked to sign IRS Form 4506 that allows the town to request a copy of your 2022 Federal Tax return.

**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 [inohavec@westonct.gov](mailto:inohavec@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 2/14/2023