

INCOME BASED TAX RELIEF SUPPORTING DOCUMENT HELP SHEET

OWNERSHIP VERIFICATION:

- ☐ Copy of trust, if applicable. (If there have been changes since last year provide a new copy)

PRIOR YEAR INCOME VERIFICATION FROM ALL HOUSEHOLD MEMBERS

- ☐ 2023 Federal tax return with ALL schedules
- ☐ 2023 - 1099 documents including but not limited to Social Security (SSA-1099)
- ☐ PREVIOUS APPLICANTS - October, November & December 2023 financial statements from ALL banking institutions
- ☐ **NEW APPLICANTS** – January 1, 2023 – December 31, 2023 financial statements from ALL banking institutions

NOTE: *Applicants may be asked to provide additional financial information*

EXAMPLES OF HOUSEHOLD INCOME:

- Adjusted Gross Income per Federal Tax Return
- Social Security, Medicare, Railroad Retirement, or Military Retirement
- Gross pension benefits (including Veterans Disability Compensation)
- Dividend and interest income including any nontaxable interest received
- Capital gains excluded from Adjusted Gross Income
- Loss carry forwards and residential depreciation claimed on your Federal Tax Return
- Welfare, Worker's Compensation, alimony, child support and strike benefits
- Earned income credit and other credits claimed on your Federal Tax Return
- Wages, salaries, and other employee compensation
- Gross amount of annuities and trust income received
- Withdrawals and distributions from 401(k), 457, or IRA accounts
- Voluntary contributions to a tax-deferred retirement plan
- Business and rent income: Rent % Business %
- Other income
- Income from other members of household

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