

# 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

- ☐ 2024 Federal tax return with ALL schedules
- ☐ 2024 - 1099 documents including but not limited to Social Security (SSA-1099)
- ☐ PREVIOUS APPLICANTS - October, November & December 2024 financial statements from ALL financial institutions
- ☐ NEW APPLICANTS – January 1, 2024 – December 31, 2024 financial statements from ALL financial institutions
- ☐ WE DO NOT ACCEPT ANY REDACTED DOCUMENTS

**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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