

## State of Connecticut

### Exemptions

An exemption is a reduction in an approved applicant's real or personal property (motor vehicle) assessment administered by the Town Assessor in which the applicant resides. Residency and ownership must be established on or before the assessment date, October 1st. You must provide exemption eligibility on or before the assessment date, unless a later date is noted.

**The following programs administered by the Town of Monroe Assessor's Office**

#### Tax Exemption for Blind Persons

State law provides an assessment reduction of 3,000 for blind property owners.

##### **Requirements:**

1. An applicant must meet the definition of blind set forth in Connecticut General Statute 12-92; and
2. Provide proof of blindness such as a certification by a qualified doctor
3. Filing deadline October 1st

#### Tax Exemption for Disabled Persons

State law provides an assessment reduction of 1,000 for permanently and totally disabled property owners.

##### **Requirements:**

1. Qualified as permanent and totally disabled by Social Security or other Federal, State or local retirement program
2. Provide proof of total disability to the assessor, award letter.
3. Filing deadline October 1st.

**For more information and applications,  
please contact the Assessor's Office or  
visit our website:**

[www.monroect.org/assessor](http://www.monroect.org/assessor)

## TAX RELIEF PROGRAMS FOR THE ELDERLY & DISABLED

## State of Connecticut and the Town of Monroe



**Assessor's Office**  
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# State of Connecticut Tax Relief Program For Elderly & Disabled persons

Tax credit is only for property of residence.

Requirements:

1. Own or have life use and reside at property as of October 1 the year before applying.
2. Resident of and living in Connecticut for one year.
3. Applicant or spouse 65+ years of age or 100% disabled per The Dept of Social Security or a 50+ year old surviving spouse.
4. File application with the local Assessor Office February 1st to May 15th. Call to schedule an appointment to apply.
5. Proof of income requires a completed Federal Tax Return and Social Security annual statement of benefits form 1099. Following approval of the initial application, the applicant must file biennially. It is the responsibility of the applicant to notify the Assessor's Office of any change in income.

Note: Qualifying income limits change periodically.

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## Town of Monroe Local Tax Relief Options For Elderly & Disabled persons

The Town of Monroe offers two local ordinances to provide additional tax relief to elderly and disabled residents. Qualifying applicants may choose either option A or option B in addition to the State relief program.

### Local Tax Relief Option A Elderly & Disabled Tax Relief Program

#### Qualifications

1. Be 65 years of age or older or totally disabled. Surviving spouse must be at least 62 years of age to continue benefit. Only one benefit allowed per household.
2. Be totally disabled (proof required in the form of **Notice of Award Letter** or **TPQY** from Social Security Administration) Benefit is removed when the disabled applicant is deceased.
3. Must be resident one year preceding Grand List of October.
4. Own (or have life use) and occupy the property as their legal domicile for which taxes are paid to the Town of Monroe. Occupy principle residence more than 183 days a year.
5. Qualifying income must not exceed \$60,000 per household whether single or married.
6. Proof of income requires a completed federal tax return along with Social Security 1099's. Following approval of the initial application by the Assessor's Office the applicant must file biennially.

It is the responsibility of the applicant to notify the assessor's office of any change in their income.

Partial ownership applicants will receive the benefit equal to the percentage of ownership e.g. if 50% ownership receives 50% of benefit.

Filing period is February 1 through May 15. Call the Assessor's Office to schedule an appointment to apply.

Failure to file constitutes cause for removal from the program.

### Local Tax Relief Option B Tax Deferral Program §470-6

Residents who meet the criteria for Option A may enter into an agreement with the town and defer up to 75% of tax per year. Tax deferred shall be subject to an interest equal to 3% per annum, accrued monthly and compounded annually until fully paid.

Tax deferral is in lieu of Option A.

Property owners may not defer more than 70% of current assessed value. (49% of market value)

Taxes deferred including accumulated interest shall be due and payable upon transfer or conveyance of title.

The Tax Collector may use all legal remedies including a tax foreclosure if the taxpayer is delinquent on that portion of the tax that has not been deferred.

Applicants must file annually.

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#### Renters Rebate Program

In order to receive a Renters Rebate:

1. Must file an application annually with the Town of Monroe between April 1 and October 1.
2. The applicant or the spouse must be 65 years of age or older or be 100% disabled (per Social Security) or be 50 and be a surviving spouse.
3. Must have lived in Connecticut for one year.
4. Thirty-five percent of applicant's annual rent must exceed 5% of the applicant's annual income. (Must not exceed State income guidelines.)
5. A federal income tax form must be provided along with SSA 1099s. In addition, rent and utility payments made in the previous calendar year must be provided.