



**Income Worksheet Checklist  
for Partial Exemption from Real Property Taxes for Senior Citizens  
and for Persons with Disabilities and Limited Income  
(For Informational Purposes Only)**

The above exemption programs are based in large part on financial need.  
Submit copies of all items for the year **2022**, including all year-end statements.

- Federal or NYS Individual Income Tax Return
- Corresponding Schedule(s):  1,  C,  E,  F
- Federal or NYS Partnership or S Corporation Income Tax Return
- Income from Estates or Trusts
- Salary or Wages (W-2), including bonuses and/or tips
- Social Security (Form SSA 1099)
- Retirement/Pension(s)/ IRA investment(s) (Forms 1099-R)
- Annuity Payments, including IRAs (Form 1099-R)

*Annuity Recipients Please Note: For the purpose of this exemption and according to NYS Office of Real Property Tax Services Office of Counsel, it is your responsibility to provide documentation of the portion of your distribution which is a return **of** your investment. Return **on** your investment (whether taken or not) is considered "income". IRS Section 1035 annuity exchanges (contract to contract) may be exempt from income if you provide proof that the exchange is non-taxable. Contact your investment advisor for assistance. However, remember, there are differences between investment procedures, the IRS Code, and the regulations we must follow.*

- Annual Earnings Statement on any IRA accounts, non-taxable, however invested (interest, dividends, and/or capital gains are income, not the distributions)
- Interest- or Dividend-bearing Savings Account(s)
- Interest- or Dividend-bearing Checking Account(s)
- Investment Dividends or Interest, including non-taxable bonds and IRAs
- Capital gains (realized) from sale or exchange of investment(s)
- Self-employment NET Income (must show both income and expenses)
- Rental Income and Expenses (including room & board, or other funds from other residents or family members sharing expenses of the dwelling)
- Payments from Qualified Education Programs (1099-Q)
- Alimony (paid or received)
- Support Payments (received)
- Unemployment Insurance Payments
- Worker's Compensation
- Lottery/Gambling winnings
- Any source of income from foreign countries
- Other: