

CITY OF SHELTON

SENIOR TAX RELIEF COMMITTEE

Regular Meeting
August 29, 2005

Roll Call

Chairman Ron Pavlucik - present
Vice-Chairman Ann Walsh - present
Steve Morse - present
Carol Savignano - present
Gary DeFilippo - absent

Invited guest: Gloria Kovac, Tax Assessor

The meeting was called to order at 5:30pm in Room 104 City Hall.

Minutes from the August 22, 2005 organizational meeting were unanimously approved.

Goals, Objectives and Plans process procedure was provided to committee members. Steve Morse was tasked to provide draft language for program loop back for tax relief program elements.

Ann Walsh advised members of a list of tax relief issues she has prepared. Committee suggested she Email to members for further review and assessment as they may relate to program elements to be discussed at next meeting.

Tax Relief Committee Tenure-----Ron Pavlucik provided discussion information with Mayor's Office regarding tenure of appointed committee. State Statute Section 12-129(n) provides 60 days. Awaiting Corporation Consul's review and advice on start date.

Members discussed Reverse Mortgage commercial option available to seniors. These programs provide immediate cash from built up in home equity but carry very high closing cost and fees and initiate a lien against the property. Ron Pavlucik provided an example of reverse mortgage costs.

Future Tax Committee meeting dates: Listed below are proposed meeting dates for member consideration:

Sept 7 or 8 at 5:30pm
Sept 12 at 5:30pm
Sept 19 at 5:30pm
Sept 26 at 5:30pm

Current Senior Tax Relief Program Review:

Gloria Kovac-City of Shelton Tax Assessor discussed history of Shelton's programs available to Seniors 65 and over, veterans and totally disabled and blind homeowners. In summary they are:
State Tax Credit Program for married and single IAW eligibility and income limitations.

City of Shelton Ordinance #666 dated 2/22/94 of \$150.00 IAW eligibility and income limitations set by State program Section 12-170aa.

For Year 2005: 563 homeowners on this program.

Cost to Shelton of \$81,375

Assessor provided an analysis of department workload which includes forms processing for Senior, veterans, blind and totally disabled persons as well as the City's Property revaluation process.

Assessor recommended Committee keep future programs simple, easy to implement from an administrative viewpoint and easy to understand from the applicant view. In addition, suggested a provision be established to review the program every three or five years after adoption.

Assessor advised many seniors mortgages are paid off and a number have the residence in children's name with a "life use" notation on the deed. These people do qualify for tax relief.

To assist the Committee, the Assessor was tasked to provide the number of Seniors in each of the state programs income brackets and whether married or single. For the City program number of homeowners married or single. Also, a breakdown of the Year 2005 State Programs costs submitted vs amount reimbursed to the City, when available.

The agenda for the next meeting will be to continue brainstorming on possible programs and develop program characteristics. Tax Collector Deborah Onderko will be invited to a future meeting.

The meeting was adjourned at 6:50pm

The next meeting is scheduled for either Sept 7 or 8.

These minutes were prepared by Steve Morse
August 30, 2005
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