

CITY OF SHELTON

SENIOR TAX RELIEF COMMITTEE

Regular Meeting  
November 9, 2005

Roll Call

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

Also present: Deborah Onderko, Tax Collector

The second meeting of the re-appointed committee (sixth overall) was called to order 5:35 pm in City Hall Room 104.

The minutes from the October 24, 2005 were reviewed and approved with the following two changes:

Change first sentence "The fifth meeting...." to "The first meeting of the re-appointed committee....".

Revise Past Due Taxes or Assessments section to read:

"No delinquent real estate, personal property, motor vehicles taxes, or sewer or water assessments, or sewer usage fees allowed to receive the Local Tax Credit."

The Goals, Objectives, and Plans document was reviewed. Note that our final report is due to be submitted not later than 12/14/05.

The Committee continued work on a new "City of Shelton Local Tax Credit Program". Some eligibility and benefit parameters were modified from that set an earlier meeting, resulting in the following new version below, which offers increased benefits while further tightening eligibility requirements:

**Applications:** Must file for State Homeowners Elderly/Disabled Tax Relief Program concurrently with The City of Shelton Senior Elderly/Disabled Program with the City's Tax Assessor.

**Age/Disability:** 65 or over and or Totally Disabled

**Spouse:** No automatic survivor eligibility. If an eligible senior passes away, the surviving spouse must re-apply and meet all eligibility requirements to qualify for a tax credit the following year.

**Qualifying Max Income:** Married: \$1000 above the State's Maximum Income----YR2005 \$34,900  
Single: \$1000 above the State's Maximum Income----YR2005 \$28,700  
Note: Qualifying Income is defined in State Statute Section 12-170aa(b)

**Tax Credit:**

Group #1: Age 65 or over or Totally Disabled:

\$250 per household for either a Married couple or Single individual.

Group #2: Age 75 or over:

\$500 per household for either a Married couple or Single individual.

**Maximum Assets Test:** Excluding the value of the City of Shelton legal residential property, the Applicant's remaining assets may not exceed \$200,000 as attested to in the signed application for tax relief.

**Legal Residence:** To qualify for Local Tax Relief the property must be the legal residence of the applicant.

**Residency:** The applicant must have lived in Shelton for at least the last 10 years.

**Occupancy:** The applicant must have resided on the property for at least 9 months of the previous year.

**Past Due Taxes or Assessments:** No delinquent real estate, personal property, motor vehicles taxes, sewer or water assessments or sewer usage fees are allowed in order to receive the Local Tax Credit.

**Children:** The applicant shall be disqualified if any children under the age 18 and are attending City of Shelton schools reside on applicant's property. The applicant shall attest to this in the application.

**Tax Relief Program Applications:** Bi-Annual basis unless the applicant's qualifying income dramatically changes.

**Costs:** Current Program, for 2005: 563 participants -----\$81,300/Yr "cost" (lost tax revenue)

Proposed Program, for 2006: estimated 600 +/- participants ----- "cost"

The Committee briefly discussed the format and content for the final report. Steve Morse advised that the report should be addressed to the Board of Finance per State Statute 12-129n and as a minimum shall include the following: (1) fiscal effect of such property tax relief on property tax revenue for the City of Shelton, and (2) recommendations with respect to the form and extent of such property relief. Courtesy/Information copies may be provided to the Mayor, Tax Assessor, Tax Collector and Corporation Counsel. Consideration for a report not longer than two pages is desired.

The Committee would like to know if the proposed 2-tier tax credit (250/500) might cause a problem with the computer program that today deals with only one credit amount when printing tax bills.

A local newspaper recently provided a listing of annual Social Security cost of living adjustments going back many years. The Committee applied these annual adjustments to the City of Shelton's Elderly and Disabled Tax Credit Program where the tax credit has been held constant at \$150 since 1994. If the Shelton credit set at \$150 in 1994 were to increase at the same rate as the cost of living, the credit should be about \$203 next year. (As indicated above, the committee is proposing it be raised to \$250 for seniors over 65 and \$500 for seniors over 75 years of age).

The next meeting is scheduled for November 14, 2005 at 5:30 pm at City Hall. The main item on the agenda will be to finalize the proposed Local Tax Credit Program as defined above. Future meetings are set for Monday November 21st and Monday November 28th.

Comments/impact will be solicited from the Tax Assessor and the Tax Collector. Then we need to finalize the format and content of the final report.

The meeting was adjourned at 6:50 pm

These minutes were prepared by Steve Morse  
Approved on November 14, 2005  
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