



# O'65 PARTIAL EXEMPTION

**NYS DEPARTMENT OF TAXATION & FINANCE IS NOW VERIFYING ELIGIBILITY FOR THE STAR PROGRAM FOR QUESTIONS REGARDING STAR, PLEASE CONTACT NYS DEPARTMENT OF TAXATION & FINANCE @ 518-457-2036 OR WWW.TAX.NY.GOV/STAR**

## INSTRUCTION SHEET

**Filing Deadline: MAY BE FILED NOW, UP TO BUT NO LATER MARCH 1<sup>st</sup>, 2024.**

**Application Accepted:**                      **In Person:**                                      **Mail: Must be POSTMARKED no later than March 1<sup>st</sup>.**  
Monday through Friday                      Assessor's Office / O'65 Partial  
9:00AM to 4:30PM                                      One Independence Hill  
Farmingville, NY 11738

**\*WHEN MAILING, REGISTERED/RETURN RECEIPT IS RECOMMENDED\***

- Requirements:**
1. The applicant must be the recorded owner and occupant of a one, two, three-family residence, farm home, condominium, or Co-op. (The O'65 Partial Exemption is not available for seasonal residences).
  2. All owners must be 65 years of age or older by December 31<sup>st</sup>, 2024. Property owned by a married couple or siblings, only one must be 65 years of age or older.
  3. Combined **Federal Adjusted Gross Income (subject to adopted revisions of income)**, of **ALL** owners and spouses cannot exceed **\$58,399.99. (Adopted by each municipality)**
  4. The eligible applicant must be the recorded owner and/or spouse, or sibling of the home within the Town of Brookhaven for 12 months prior to March 1<sup>st</sup>.

**In addition to the COMPLETED and SIGNED application, The Town of Brookhaven requires PHOTOCOPIES of the following: (No Originals they WILL NOT be returned to you)**

- Submit Photocopies of:**
1. **To prove ownership, you must provide one of the following:**  
a) **Recorded Deed** for a house/condominium, **IF PURCHASED WITHIN THE PAST 6 MONTHS**  
b) **Bill of Sale** for Greenwood Village    c) **Certificate of Shares** for Co-op  
**\*Note:** If ownership is in a "Trust", include a copy of the Trust.
  2. **To prove age, you must provide one of the following for each applicant:**  
a) NY Driver's License or NY Non-Driver ID    b) Birth Certificate    c) Passport
  3. **\*To prove residency, you must provide one the following for each applicant AND spouse:**  
a) NY Driver's License or NY Non-Driver ID    b) Car Registration    c) Voter's Registration Card
  4. **If spouse is deceased, a copy of Death Certificate.**
  5. **If divorced or legally separated, a copy of the Divorce Decree, or Legal Separation. Non-resident owners must show proof of residency of where they reside.**

\*NOTE: YOUR CHOICE MUST REFLECT THE PROPERTY ADDRESS

**TO PROVE FEDERAL ADJUSTED GROSS INCOME, YOU MUST SUBMIT PHOTOCOPIES OF THE FOLLOWING: FOR ALL OWNERS AND SPOUSES.**

**ALL INCOME SUBMITTED MUST BE FOR THE 2022 TAX YEAR, WE CANNOT ACCEPT 2023**

IF YOU FILE AN INCOME TAX RETURN, YOU MUST SUPPLY A COPY OF YOUR FEDERAL RETURN WITH COPIES OF YOUR 1099'S FOR ITEM 2 OF THE LIST ON THE RIGHT.

ALL OWNERS & SPOUSES MUST ATTACH PROOF OF INCOME FOR 2022 ONLY.

1. Copy of the **ENTIRE** 2022 Federal Income tax return including **ALL** schedules & 1<sup>st</sup> page NYS.
2. Copy of Social Security, IRA, Pension, Annuity, interest, dividends, & unemployment 1099's
3. Copy of all W-2 showing salary & tips received.
4. Proof of any rental or business income.
5. Applicants **must** report any income towards household expenses received from anyone living on premises (rent from family members, friends, or tenants).
6. Copy of most recent mortgage, reverse mortgage, or home equity loan statement.
7. Proof of sale for prior residence if sold in **2022 or 2023**.

**IF YOU ARE NOT REQUIRED TO FILE A TAX RETURN YOU MUST SUPPLY PHOTOCOPY PROOF OF ALL SOURCES OF INCOME INCLUDING ALL 1099'S. WE RESERVE THE RIGHT TO REQUEST ADDITIONAL INFORMATION AND/OR AN OFFICIAL TAX RETURN TRANSCRIPT FROM THE IRS.**

**Approval:** If this exemption is approved, the savings will be applied to the **December tax bill**.

**Denial:** Notice of Denials will be mailed to applicants by May 1<sup>st</sup>.

**Mandatory Renewing:** The **O'65 Partial Exemption** requires a renewal application to be filed each year **by March 1<sup>st</sup>**. Approved exemptions will automatically receive a renewal application for the following year. Please call our office if you do not receive your renewal by January 1<sup>st</sup>.

**Receipt:** Please complete and return the attached post card "**Receipt**" with your application. It will be "**Date Stamped**" and returned to you.

## O'65 PARTIAL EXEMPTION

**Form RP-467 no longer serves as a dual application for the Enhanced STAR exemption.** Form RP-467 is only used to apply for the Partial tax exemption for real property of senior citizens. It may not be used to apply for the Enhanced STAR exemption, which is a separate exemption. If you have Basic STAR on your property currently and want to apply for Enhanced STAR you must file RP-425-E & RP-425-IVP by March 1<sup>st</sup>, 2024. If you do not already have a STAR exemption you may not apply for a new STAR exemption, but you may be eligible for a STAR credit, which is provided in the form of a check from NYS Department of Taxation & Finance. For more information about the STAR credit, visit [www.tax.ny.gov/STAR](http://www.tax.ny.gov/STAR) or call 518-457-2036. The RP425-IVP form is a ONE TIME FILING, if you have already filed you do not have to file again.

## KEEPING US INFORMED

Please remember, when completing your annual renewal application, to provide us with your **latest** personal contact information; such as, your home phone number, cell number, email address, mailing address, etc....

By providing this information, we will have the ability to contact you concerning any changes to your real property tax exemptions.

### **ANY ADDITIONAL CHANGES MUST BE REPORTED TO THE ASSESSOR'S OFFICE**

**PROMPTLY:** It is the responsibility of the property owner or their next of kin/power of attorney to notify this office of **ALL** important changes/updates. Proof is required for any changes in: **income, ownership, trust, marital status, death, or primary residence.**

To be considered for the Partial O'65 Real Property Tax Exemption please read and answer all questions on attached application completely and accurately. Submit completed signed application with ALL supporting documents no later than March 1<sup>st</sup>, 2024.

**DEADLINE FOR FILING IS NO LATER THAN MARCH 1<sup>st</sup>, 2024.**

**Thank you for keeping us up to date, so that we may better serve you.**

Thank You,

**FELIX WIENCLAW**  
Assessor

**For information or questions on**  
**O'65 Partial Exemption:**  
Office of the Assessor  
631-451-6300

**For information or questions**  
**Enhanced Star Exemption:**  
New York State Dept of Finance  
518-457-2036



Town of Brookhaven Long Island

NYS DEPARTMENT OF TAXATION & FINANCE
APPLICATION FOR PARTIAL TAX EXEMPTION FOR REAL PROPERTY OF SENIOR CITIZENS
NYS DEPARTMENT OF TAXATION & FINANCE IS NOW VERIFYING ELIGIBILITY FOR THE STAR PROGRAM FOR QUESTIONS REGARDING STAR. PLEASE CONTACT NYS DEPARTMENT OF TAXATION & FINANCE @ 518-457-2036 OR WWW.TAX.NY.GOV/STAR

Do not file this form with the Office of Real Property Tax Services (General information and instructions for completing form are contained in RP-467-Ins.)



- 1. Name & mailing address of all owners & spouses: 2. Date of birth of all owners & spouses:

\_\_\_\_\_

- 3. Home/Cell #:

\_\_\_\_\_

Email:

- 4. Location of property:

Street address City/Town Zip code

- 5. Suffolk County Tax Map # District Section Block Lot or Name of Co-op: Total shares: Shares to the unit:

- 6. Date applicant(s) acquired ownership of property:

- 7. Does anyone else other than the owner or owners spouse reside at the premises? Yes No If Yes, you MUST provide a list of adults residing on the premises STATE NAMES, AGES, & MONTHLY CONTRIBUTION TO THE HOUSEHOLD BILLS.

- 8. Is any portion of the property used for other than residential purposes (farming, commercial, vacant land, professional office, etc)? Yes No If Yes, explain such use and describe the portion that is so used:

- 9. Did the owner and/or spouse of owner file a Federal Income Tax Return for the year 2022? Yes No If Yes, attach a photocopy of your ENTIRE Federal Income Tax return including ALL schedules, and ALL supporting 1099's & 1st page of NYS. If No, you must fill in the INCOME WORKSHEET on the back of the application and attach proof of ALL of income, including ALL 1099's. We may also require official tax return transcript from the IRS.

- 10. Did the owner sell a prior residence in 2022 or 2023? Yes No If Yes, please enter address, sale date, original purchase price & sale price:

- 11. Does the owner and/or spouse have a mortgage, reverse mortgage, or home equity loan? Yes No If Yes, attach a photocopy of your most recent statement.

- 12. Does a child(ren), including those of tenants living on the premises currently attend public school in Grades K through 12? Yes No If Yes, list the name, age of the child(ren), and location of school:

- 13. Does the owner or spouse of, own any other property in NY, or any another state that they're claiming as a primary residence, and are receiving a residency tax benefit, such as Star or a Homestead Exemption? Yes No If Yes, please state the address(es)

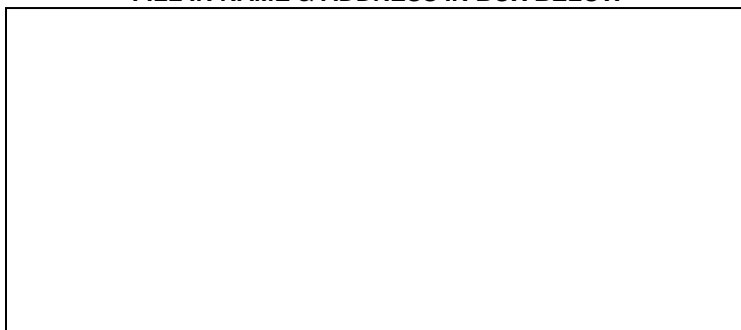
FILING DEADLINE: MARCH 1ST



Town of Brookhaven Long Island

Department of the Assessor One Independence Hill Farmingville, NY 11738

FILL IN NAME & ADDRESS IN BOX BELOW



## INCOME WORKSHEET

**To be used by individuals not required to file a Federal Income Tax Return**

**APPLICANTS ARE REQUIRED TO SUPPLY PHOTOCOPIES OF ALL INCOME RECORDED BELOW.**

Please report **ALL** income of **ALL** owners and/or spouses, except for an owner who is absent from the residence due to divorce, legal separation or abandonment. (Provide proof)

Enter the amounts below that would have been reported if you were required to file a federal or state income tax return (round to the nearest whole dollar). To round to the nearest dollar, drop amounts that are less than 50 cents (for example, \$1.39 becomes \$1) or increase amounts that are 50 cents or more to the next dollar (for example, \$2.50 becomes \$3.).

<b>Social Security benefits (attach SSA1099's).</b>	<b>1.</b>
<b>Total wages, salaries, and tips (attach W-2's).</b>	<b>2.</b>
<b>Total Pensions &amp; Annuities (attach all form 1099-R's).</b>	<b>3.</b>
<b>Total IRA distributions (attach all form 1099-R's).</b>	<b>4.</b>
<b>Total interest income &amp; dividends (attach all form 1099's).</b>	<b>5.</b>
<b>Unemployment compensation (attach form 1099-G).</b>	<b>6.</b>
<b>Rental income to household (attach rent receipts).</b>	<b>7.</b>
<b>Alimony (attach proof of payment).</b>	<b>8.</b>
<b>Business income (attach proof).</b>	<b>9.</b>
<b>Capital gains.</b>	<b>10.</b>
<b>Other income (ex. Gambling winnings).</b>	<b>11.</b>
<b>List the types of other income on line 11:</b>	
<b>Add lines 1 through 11 and enter in line 12</b>	<b>12.</b>

**SIGNATURES for ALL OWNERS and SPOUSES of,  
are REQUIRED for APPLICATION TO BE COMPLETE.  
FAILURE TO DO SO WILL RESULT IN DENIAL OF THE EXEMPTION.**

I (we) certify that all statements made on this application are true and correct to the best of my (our) belief and I (we) understand that any willful false statement of material fact will be grounds for disqualification from further exemption for a period of five years, and a fine of not more than \$100.

First Name	M.I.	Last Name	Marital Status	Signature	Date

**TOWN OF BROOKHAVEN  
O'65 PARTIAL EXEMPTION ONLY  
(STAR EXEMPTIONS TO BE VERIFIED THROUGH  
THE NYS DEPT OF TAXATION & FINANCE)  
RECEIPT**

\_\_\_\_\_  
Suffolk County Tax Map # or Name of Co-op

\_\_\_\_\_  
Item #

