Exemption Checklist

- Birth Certificate or driver's license
- Death Certificate copy (for a widow or widower if first application)
- Social security Benefit statement or SSA-1099
- SSI Benefit (if applicable provide proof of amount received)
- All other Pensions provide copies of form 1099
- Federal Income Tax return copy including all schedule
- Dividend & Interest statement copies (form 1099) for all accounts
- Bank books or statement copies to verify all account balances as of July 1. This includes the following:
  - Checking Accounts
  - Savings Accounts
  - Savings Bonds
  - IRA's
  - Certificates of Deposit (CD's)
  - Annuities
  - Stocks
  - Mutual Funds
- Rent receipt copies for multi-family homes (if applicable)
- Provide any other information requested on the application
- If any changes in property held in trust since your last application documentation must be provided showing that you are still trustee and beneficiary of that trust.

All information provided is confidential

<u>Incomplete applications will be denied and returned to you</u>

<u>All information must be provided in order to process application</u>