

**TOWN OF MIDDLETOWN – Office of the Tax Assessor/Collector**  
 350 East Main Road – Middletown RI 02842 Phone: 401.847.7300  
**APPLICATION FOR SENIOR EXEMPTION ON RESIDENTIAL PROPERTY – 2023**

NAME: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 CO-APPLICANT: \_\_\_\_\_ DOB: \_\_\_\_/\_\_\_\_/\_\_\_\_  
 ADDRESS: \_\_\_\_\_ PHONE: \_\_\_\_\_  
 EMAIL ADDRESS: \_\_\_\_\_

**Do you claim a personal exemption anywhere else?** Yes No  
**Legal Resident for 5 or more years as of 12/31/2022?** Yes No  
**Are you a registered Voter in Middletown?** Yes No

Marital Status: Single Married Divorced Widow/Widower

If your total gross annual household income is **more than \$59,200 - a FLAT exemption is applied.** This exemption will reduce the assessed value of your property for taxation purposes. There is no need to report your income.

**FLAT EXEMPTION VALUES**

<b>Age 65 - 69</b>	1A	\$47,800
<b>Age 70+</b>	1E	\$52,600

If your total gross annual household income is **\$59,200 or less - you may be eligible for a greater exemption.** Report your total gross annual household income for 2022 below and provide the required documentation to support your request (see reverse).

**INCOME BASED EXEMPTIONS**

INCOME LEVELS		Age 65 -69		Age 70+	
Income of at least	But no more than	CODE	EXEMPTION	CODE	EXEMPTION
\$0	\$27,700	1D	\$140,800	1H	\$155,100
\$27,701	\$32,300	1C	\$109,900	1G	\$120,900
\$32,301	\$59,200	1B	\$ 78,900	1F	\$ 86,800

Date Rec'd:	Wages, Salaries, Tips, etc.	_____
	Dividends	_____
	Interest	_____
	Social Security	_____
	Pensions, Annuities, Retirement	_____
	Gross Business Income	_____
	Capital Gains, Gifts, Inheritance	_____
	Gross Rents, Royalties	_____
	Farm Income	_____
	Disability Payments	_____
Other _____	_____	
<b>TOTAL INCOME</b>		_____

See reverse for eligibility information and notarized signature →

**ELIGIBILITY**

**Residency**

- All legal, full-time residents of the Town of Middletown, age 65 or older, who **own and occupy** real estate that is used as their home of legal residence, are eligible for this exemption. The exemption also applies to a life tenant who has the obligation for payment of the tax on real estate.
- Applicants must be a **Middletown resident for five consecutive years prior to application**. Seasonal or temporary residence within the town, of whatever duration, shall not constitute residence for this exemption.
- In the event of multiple ownership and/or occupancy of the same piece of property, only one senior exemption shall be granted to the household, even if all such owners are eligible under the requirements.
- **Reestablishment of Residency** – A person who qualifies for and receives this exemption who subsequently moves their legal domicile outside of the town but continues to maintain ownership of a residential dwelling unit within the town, shall be entitled to reapply and qualify for a senior exemption without waiting an additional (5) year period provided they reestablish their legal domicile within the town and otherwise meet all other requirements.

**Age**

- You must be **65 years of age or older** as of the assessment date for the year for which the exemption is claimed (**by 12/31/2022**). All applications are subject to age verification and must be updated for change in age bracket.

**Income**

- Income for the purposes of this ordinance is defined as the **combined gross annual income received** from all sources during the **calendar year prior to the year of application (2022)** and is subject to verification.
- **Combined gross annual income** is to include the income of all persons living in the household as well as income of a spouse and all co-tenants, joint tenants, and/or tenants in common - regardless of whether they occupy the real estate involved. Exception: live-in caretaker or care-giver with other primary residence.
- No form of income is to be excluded for this exemption. Include such income as federally tax-exempt Social Security, disability payments, gifts and interest, or dividends from normally tax-exempt investments; **use 2022 end of year statements (W-2, SSA-1099, 1099, etc.) for verification purposes.**

**Other Exemptions**

- If you are claiming a personal exemption (including a homestead) in any other city, town or state, you are **not** eligible to claim a senior exemption in Middletown.

I have read and understand the eligibility requirements of this exemption and do hereby swear and affirm that the information provided is true, to the best of my knowledge and belief. By signing below, I affirm that I have not applied for, nor am I receiving a senior or Homestead exemption in any other state or municipality, and that Middletown is my home of legal residence.

Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Notary: \_\_\_\_\_

Date: \_\_\_\_\_

Co-Applicant: \_\_\_\_\_

Date: \_\_\_\_\_

Notary: \_\_\_\_\_

Date: \_\_\_\_\_

***Exemption applications must be received in the Assessor’s Office by March 15, 2023***

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AND IS NOT FOR PUBLIC INSPECTION**