

# INCOME BASED TAX RELIEF SUPPORTING DOCUMENT HELP SHEET

## OWNERSHIP VERIFICATION:

- Copy of trust, if applicable. (If there have been changes since last year provide a new copy)

## PRIOR YEAR INCOME VERIFICATION FROM ALL HOUSEHOLD MEMBERS

### \*\*\* WE DO NOT ACCEPT ANY REDACTED DOCUMENTS

- 2025 Federal tax return with ALL schedules
- 2025 - 1099 documents including but not limited to Social Security (SSA-1099)
- PREVIOUS APPLICANTS - October, November & December 2025 financial statements from ALL financial institutions
- NEW APPLICANTS** – January 1, 2025 – December 31, 2025 financial statements from ALL financial institutions

**NOTE: *Applicants may be asked to provide additional financial information***

### *EXAMPLES OF HOUSEHOLD INCOME:*

- Adjusted Gross Income per Federal Tax Return
- Social Security, Medicare, Railroad Retirement, or Military Retirement
- Gross pension benefits (including Veterans Disability Compensation)
- Dividend and interest income including any nontaxable interest received
- Capital gains excluded from Adjusted Gross Income
- Loss carry forwards and residential depreciation claimed on your Federal Tax Return
- Welfare, Worker's Compensation, alimony, child support and strike benefits
- Earned income credit and other credits claimed on your Federal Tax Return
- W2's (i.e., wages, salaries, and other employee compensation)
- Gross amount of annuities and trust income received
- Withdrawals and distributions from 401(k), 457, or IRA accounts
- Voluntary contributions to a tax-deferred retirement plan
- Business and rent income: Rent % Business %
- Investment Accounts (2024 Yearly Statement)
- Other income
- Income from other members of household

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