

TOWN OF MIDDLETOWN – Office of the Tax Assessor/Collector
 350 East Main Road – Middletown RI 02842 401.847.7300
APPLICATION FOR SENIOR EXEMPTION ON RESIDENTIAL PROPERTY – 2024
This exemption will reduce the assessed value of your property for taxation purposes.

NAME: _____ DOB: _____

SPOUSE: _____ DOB: _____

RESIDENCE ADDRESS: _____

PHONE: _____ NUMBER OF PEOPLE RESIDING AT RESIDENCE: _____

- Do you claim a personal exemption anywhere else? Yes No
- Have you been a resident of Middletown for 5 or more years as of 12/31/2023? Yes No
- Are you registered to Vote? _____ Where? _____ Marital Status: _____

CHOOSE TYPE OF EXEMPTION (Either FLAT or INCOME BASED)

FLAT EXEMPTION TAX SAVINGS

If your combined gross annual household income is **more than \$61,000 - a FLAT exemption is applied.** There is no need to report your income for the FLAT exemption.

Age 65 - 69	1A	\$601.80
Age 70+	1E	\$662.23

See reverse for eligibility information & signature →

INCOME BASED EXEMPTION

INCOME LEVELS		Age 65 -69		Age 70+	
At least	But not more	TAX SAVINGS		TAX SAVINGS	
\$0	\$28,600	1D	\$ 1,772.67	1H	\$1,952.71
\$28,601	\$33,300	1C	\$ 1,383.64	1G	\$1,522.13
\$33,301	\$61,000	1B	\$ 993.35	1F	\$1,092.81

If your annual household income is **\$61,000 or less** - you may be eligible for a greater exemption. Report your combined gross 2023 income below. **Supporting documentation must accompany this form.**

OFFICE USE ONLY:

ACCT: _____

DEED BOOK/PAGE: _____

VOTER REG: _____

PLAT/LOT: _____

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	_____
Family or Other Assistance	_____
Other _____	_____
Total	_____

ELIGIBILITY

Residency

- Applicant must be a full-time, legal resident of the Town of Middletown and must **own and occupy** the real estate used as their home of residence. The exemption also applies to a life tenant who has the obligation for payment of the tax on the real estate.
- Applicant 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** – An applicant who qualified for and received this exemption who moves their legal residence outside of 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

- Applicant must be **65 years of age or older** by **12/31/2023** to apply for this exemption. 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 and is subject to verification.
- **Combined gross annual income:** Include the income of all persons living in the household as well as the income of a spouse, all co-tenants, joint tenants, and/or tenants in common - regardless of whether they occupy the real estate involved. Exception: a live-in caretaker or caregiver with another primary residence.
- **Supporting documentation:** 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 2023 year-end statements (W-2, SSA-1099, 1099, etc.) for verification purposes.**
- Income based exemption: **applicant must submit copies of 2023 year-end income and non-taxable income statements with application.**

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.

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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: \_\_\_\_\_

Spouse: \_\_\_\_\_

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

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

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

***Application Deadline for Income Based Exemption is March 15, 2024.  
\* Only first-time applicants require notarization.***