

**NEW HAVEN BOARD OF ALDERMEN
Tax Abatement Petition**

**Adopted 4/07/93
Residential Property**

1. Name _____
2. Home Address _____
(street, city, state, zip code)
3. Daytime Telephone # _____
4. Date of Birth _____
5. Social Security # _____
6. Are you disabled? _____ If "yes", ATTACH a copy of your Social Security, V.A., or other agency document attesting to your disability. [Note: This information is requested to help determine eligibility for tax assistance programs.]
7. Employment Status: Employed _____ Unemployed _____ Retired _____
Provide the information indicated about your current job if you are employed. Otherwise, report on your last job.
Employer _____ Hours Per Week _____
City, State _____ # of Years There _____
Job Title _____ Annual Salary \$ _____
8. Street address of the property for which an abatement is requested

9. Number of Units _____
10. Date you acquired property _____
11. Price \$ _____
12. Mortgage on the property now? _____ If "yes", when will it be paid off? _____
13. Government Assistance. Have you ever before applied for or received abatements or other government assistance for any property located in New Haven? _____ If "yes", explain below:

14. Other Financial Assistance. Have you applied to a bank or other institution for financial assistance? _____ If "yes", ATTACH a letter or other document from the institution showing the results of its review.
15. Exemptions and Tax Reductions. You must meet with the Assessor or his representative to apply for any exemptions or tax reductions for which you are eligible. ATTACH a document from the Assessor showing the results of the review.

16. **Taxes Due on the Property.** List below the Grand List Years and amount of Taxes, Interest, and Lien Fees due on the property for which an abatement is requested.

Year ->	Taxes \$	+ Interest \$	+ Lien Fees \$	= Total Due \$
Totals ->				

17. **Total Abatement Requested:** \$ _____

18. **Poor and Unable To Pay.** Why do you feel you are poor and unable to pay these taxes, interest, or lien fees?

19. **Back Taxes.** Were any of these taxes due on the property when you acquired it? _____

20. **City Collection Efforts.** Has the City of New Haven referred your tax accounts to an attorney for collection? _____ **You must meet** with the Tax Collector or his representative to try to settle your tax accounts. **ATTACH** a document from the Tax Collector showing the results of the review. What efforts are you making to try to settle with the City?

21. **Pending Foreclosures.** Is anyone (City, bank, WPCA, mortgage company, doctors, etc.) trying to foreclose on this property? _____ **If "yes", list each. ATTACH** a copy of the notice you received from the sheriff.

a. Name _____ Date _____
Reason _____ Amount \$ _____

b. Name _____ Date _____
Reason _____ Amount \$ _____

22. Liens, Attachments, Encumbrances. List all outstanding liens (except tax liens), attachments, and encumbrances on the property for which you are requesting an abatement. For each, list the name of the person or organization you owe, the date and amount of the lien, attachment, or encumbrance, and the volume and page number in the New Haven Land Records. **ATTACH** a copy of each document.

a. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

b. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

c. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

d. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

e. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

f. Name _____
 Date _____ Amount \$ _____ Volume _____ Page _____

23. Financial Planning Assistance. Have you obtained financial planning assistance from a government or private agency? _____ If "yes", **ATTACH** a letter or other document from the agency showing how this may affect your ability to meet your current or future tax obligations.

24. Cash and Savings. Show the amount of money you have in each.

Checking \$ _____ Savings \$ _____ I.R.A./Keogh \$ _____
 Certificates of Deposit \$ _____ Money Market \$ _____
 U.S. Savings Bonds \$ _____ Other \$ _____ Cash \$ _____

25. Insurance and Annuities. List the total face value and cash value of insurance and annuity policies you own. **ATTACH** a company statement showing the value of each policy.

Insurance: Face \$ _____ Cash \$ _____
 Annuities: Face \$ _____ Cash \$ _____

26. Stocks, Bonds, Other Securities. List the total value of your stocks, bonds, and other securities. **ATTACH** statements from the companies or your broker showing what you own and the current market value of your holdings.

Stocks \$ _____ Bonds \$ _____ Other \$ _____

27. Other Investments (except real estate). Show the type of thing you have invested in (such as stamps, coins, antiques, precious metals, etc.). **ATTACH** a recent appraisal for each investment.

Investment Type _____ Appraisal \$ _____

Investment Type _____ Appraisal \$ _____

28. Businesses. List each business you have an interest in as a sole proprietor, partner, or investor (except those listed above). **ATTACH** the most recent audited financial statements for the firm.

Name _____ Interest (\$ or %) _____

Name _____ Interest (\$ or %) _____

29. City Contracts. List each contract you have with the City to provide goods or services. **ATTACH** a copy of each.

Dept. _____ Date _____ Amount \$ _____

Dept. _____ Date _____ Amount \$ _____

30. Trusts. Are you the beneficiary of a trust or other covenant, assignment, or agreement? _____ If "yes", **ATTACH** a copy of it.

31. Claims and Lawsuits. Are you the plaintiff in any current claim or lawsuit for damages, lost income, etc.? _____ If "yes", **ATTACH** a copy of the relevant papers.

32. Vehicles. List each vehicle (car, camper, motorcycle, boat, plane) you own. **ATTACH** a copy of the registration for each.

a. Auto: Year _____ Manufacturer _____ Model _____

Purchase: Year _____ Price \$ _____

b. Auto: Year _____ Manufacturer _____ Model _____

Purchase: Year _____ Price \$ _____

c. Other: Year _____ Manufacturer _____ Model _____

Purchase: Year _____ Price \$ _____

33. Real Estate. Provide the information specified for each property you own (except the property involved in this petition for an abatement). **ATTACH** a copy of the deed and mortgage documents for each property listed.

a. Address _____ Price \$ _____
 Property Type: Residential _____ Commercial _____ Mixed _____

b. Address _____ Price \$ _____
 Property Type: Residential _____ Commercial _____ Mixed _____

34. Miscellaneous Debts. List below all debts over \$200 (except the mortgage and taxes on your home). Include loans, credit cards, overdue income taxes, utilities, and other (doctor, hospital, etc.). For each show the name of the person you owe and the debt amount. **ATTACH** a copy of the most recent statement for each debt.

a. Name _____ Debt \$ _____

b. Name _____ Debt \$ _____

c. Name _____ Debt \$ _____

d. Name _____ Debt \$ _____

e. Name _____ Debt \$ _____

f. Name _____ Debt \$ _____

g. Name _____ Debt \$ _____

h. Name _____ Debt \$ _____

i. Name _____ Debt \$ _____

j. Name _____ Debt \$ _____

35. Dependents. Do you have any dependents? _____ If "yes", list them below. Include each person's name, relationship to you, age, and each one's annual income.

Name _____ Relation _____ Age _____ Income \$ _____

Name _____ Relation _____ Age _____ Income \$ _____

Name _____ Relation _____ Age _____ Income \$ _____

Name _____ Relation _____ Age _____ Income \$ _____

Name _____ Relation _____ Age _____ Income \$ _____

36. Income. For each Grand List Year for which you are seeking an abatement, list your gross Pay (salaries, wages, etc.), Investment income (interest, rents, capital gains, etc.), and Other income (Social Security, pension, unemployment, inheritances, family contributions, etc.). **ATTACH** income tax returns, W-2 Forms, 1099 Forms, etc. to document all income.

Year ->	Pay \$	+ Investments \$	+ Other \$	= Total \$

37. Income This Year. Estimate your income for this year using the same categories as above in #34. **ATTACH** pay stubs, Social Security benefits statements, etc.

Pay \$ _____ + Investments \$ _____ + Other \$ _____ = Total \$ _____

Average Monthly Income (Total divided by 12) -----> \$ _____

38. Average Monthly Expenses. Estimate your typical monthly expenses for this year. **ATTACH** current bills, etc.

Mortgage or Rent (excluding tax escrow) \$ _____

Utilities: Elec. \$ _____ Oil \$ _____ Gas \$ _____ \$ _____

Sewer \$ _____ Water \$ _____ Phone \$ _____ Cable \$ _____

Food \$ _____

Clothing, Laundry, Household \$ _____

Insurance: Life \$ _____ Medical \$ _____ Auto \$ _____ Home \$ _____ \$ _____

Other Medical and Dental \$ _____

Transportation (bus fares, gas, etc.) \$ _____

Debts (loans, credit cards, etc.,) \$ _____

Savings and Retirement \$ _____

Gifts, Donations, Other Expenses \$ _____

Income Taxes: Federal \$ _____ State \$ _____ \$ _____

New Haven Property Taxes: Home \$ _____ Auto \$ _____ \$ _____

Total Average Monthly Expenses -----> \$ _____

REVIEW all questions to be certain that you have answered them fully and accurately. Incomplete petitions will not be accepted by the Board of Aldermen.

ATTACH copies of all documents specified as you were filling out the form. If the documents are not included with the petition when it is submitted, the petition will not be accepted by the Board of Aldermen.

REMEMBER that this document must be signed in the presence of a Notary Public, Justice of the Peace, or Commissioner of the Superior Court (a lawyer). Do not sign it in advance. The Oath below must be signed by the petitioner(s) or the petition will not be accepted by the Board of Aldermen.

OATH BY THE PETITIONER(S)

I/We, the undersigned, do swear to and understand the following:

1. **The information provided on this petition, attached to it, or otherwise submitted with it by me/us, is truthful and not misleading.**
2. **I/We shall inform the City of New Haven promptly of any material changes in my/our financial condition(s), interest in the property, or legal actions pertaining to it, until such time as official consideration and recording of this petition and action on it are completed.**
3. **This petition, any information or documents contained within it or otherwise submitted in conjunction with it, and any information or documents obtained by the New Haven Board of Aldermen, its Committees, or its staff related to this petition, are and shall be a public record within the meaning of Section 1-18a(d) of the Connecticut General Statutes and said record shall be available for public inspection as required by Section 1-19(a) of said Statutes.**
4. **This petition shall be denied by the New Haven Board of Aldermen if said Board or its Tax Abatement Committee shall find that I/we have violated any portion of this Oath.**

Signature(s) of Petitioner(s) _____

Acknowledged by _____ **Date** _____
Notary Public, Justice of the Peace, or
Commissioner of the Superior Court