

Meeting Notes

RTM SENIOR & DISABLED TAX RELIEF COMMITTEE Sullivan Independence Hall 1st Floor Conference Room Wednesday, March 30, 2017, 7:00 PM

The meeting was called to order at 7:02pm.

Committee Members in attendance: Tom McCarthy, Hank Ference, Mark McDermott, Alex Durrell and Cindy Perham (arrived at 7:07)

1. Pledge of Allegiance
2. Approval of minutes from January 24th and March 15th.
 - Move by Mark McDermott, seconded by Hank Ference, approved unanimously
3. New Business: Review, analyze, and discuss disqualified 2016 tax relief applications with tax assessor.
 - Tax Assessor Office in attendance – Ken Carvell, Deborah Hogan & Barbara Baxter
 - Request for Ken and his team to identify the reasons for the loss of participants in the program.
 - Ken Carvell distributed current program guidelines. This is not up to date on the town website.
 - Tom McCarthy – can you get access to Donald Ross's private folder with this information? Ken & team – We need passwords that we don't have.
 - Tom McCarthy – We need to clean up the code.
 - Requested the 2015 participants list for review
 - Still taking applications for 2016.
 - The last three years approximately 20% of the applicants were rejected for income and assets. Assessor's office has a folder on this that they could share to review how much applicants are over the qualification thresholds and set of a floor and algorithm.
 - Tax year 2012 and 2013, eight or nine participants were on the program and did not return. Do not know why in most cases.
 - Three or four were on for years and did not return. Don not know why in some cases.
 - The assessor's office does not take applications if the applicant is over the income qualification.
 - Assessor's office is responsible for policing the code which they do not feel qualified to do. No one is auditing the program and they are concerned about misrepresentation of income, taxes and assets.
 - Assessor's office needs a procedures manual to help enforce the code.
 - Assessor's office feels that up to 10% of the participants are abusing the system. Tom McCarthy – will talk to the town attorney about what we can do about this. Some legal wording needs to be added to code and application.
 - Letters go out to all current participants in February and a press release is put in the Minuteman and Connecticut Post. Information on the program is also included in the tax bills.
 - Re-define qualified income and assets.
 - Increase qualification.
4. Public Comment
 - John Wynne, Harbor Road
 - Concerning abuse of system – add under penalty of perjury on the application, like income taxes and other legal documents. Town attorney would need to be involved.

- Need a procedure manual, interview guide and a standard set of questions for all applicants.
- Randomly audit 5%-10% of the applications per year.
- Circuit Breaker Program from the state runs at the same time as ours. How does the state identify fraud and abuse? Tom McCarthy – will talk to the town attorney about what we can do about this. Some legal wording needs to be added to code and application.

- Urban Leimkuhler, Spruce Street
 - Asset situation can be made up of stocks & bonds, IRAs, other property, etc..
 - Mandatory to begin taking \$35,000 a year out of IRAs at 70 ½.

5. Consider any other new business presented

- Next meeting date set for April 19, 2017. Tom McCarhy will alert the town clerk and reserve a meeting room.

6. Adjournment

- 8:29pm motion to adjourn moved by Mark McDermott, second by Tom McCarthy, unanimous.