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Senior and Disabled Tax Relief Committee Meeting Minutes
Location: 2nd Floor Conference Room, Sullivan Independence Hall
July 17, 2018 7:30 pm

I. Call to Order

Present: Mark McDermott, Cindy Perham, Peter Tallman, and Jill Vergara.

Absent: Michael Herley

J. Vergara called the meeting to order at 7:32 p.m. and took roll call.

II. Pledge of Allegiance

III. Approval of the Minutes, June 13, 2018

1. J. Vergara moved to accept the Minutes from the 6/13/2018 meeting. P. Tallman seconded. J. Vergara, P. Tallman, and C. Perham were in favor. M. McDermott abstained. Passed.

IV. Reports on Progress with Research

J. Vergara started the discussion with the chart that she compiled covering only about half the towns we are looking at, and she added that she is expecting research from the CCM Analyst.

V. Discussion of Potential Revisions to be submitted to L & A by November 2018

a) **Credit Program**

1336 of households of 65+, received Senior tax relief after the application process of 2018. This represents 30% of the 65+ Senior households.

J. Vergara suggested the committee looks at raising the top income level to 100K. M. McDermott reminded the committee that last year, he suggested a figure in the low 80K's so he suggested the group look for a figure between 85K – 90K. From the charts we have been reviewing from other surrounding towns, the average income is 92K.

b) **Deferral Program**

7 households have applied and qualified for this program in 2018.

J. Vergara discussed dropping the age for qualification and/or deferring 75%. *note - currently the deferral program is up to 50% with an income cap of \$84,300.

c) **Freeze Program**

No one currently is in this program

Assessor Ross contributed that the Freeze Program with the 6 year max many times is not as good as the Credit Program.

d) **QTAV eligibility requirements**

The committee discussed removing this eligibility requirement.

e) **Homestead credit and/or freeze**

A quick overview of these programs was discussed.

f) **Additional issues for discussion**

Should an additional income bracket be added? A cap adjustment?

A lengthy discussion about adding another bracket from \$73,600 - \$90,000 or whatever the top tier will be.

J. Vergara added that with 52 of the applicants getting rejected for excess income, and the income average for the applicants is 92K. It makes good sense to raise the income limits. The committee presently was unanimous in their support of this.

VI. New Business

It was decided that at the next meeting, 8/7, we would discuss the QTAV in more detail. We discussed removal of the QTAV requirement, replaced with assessment limits. R. Murray is in favor of this idea, and indicated it would be much easier to administer the program. We could look at 150% of the median assessed value for Fairfield in determining the qualification requirement.

J. Vergara said we must have a solid outline by September so that the changes we support are brought to L & A in October for 2 months, with the proposal going to the RTM in November of this year.

Finally, J. Vergara gave an overview of the Ridgefield and Redding Homestead Freeze. Being 65+ with residency requirements of 3, 5 or 10 years, taxes are frozen at 65 or whenever you start in the program. Redding is a flat credit from the research that she conducted.

VII. Public Comment

John Wynne of 144 Harbor Road was present and discussed some of the statistics. He reported that in 2015 there were 61,000 Fairfield residents. Of this, there were 20,233 households, with 29% of these households having someone 65 or older living in their house. He also referenced an Affordable Housing Committee 2015 report that said that 4,471 of those 65+ owned their own home, down from 4,617 in 2010.

Gordon McKenzie, 11 Palmer Bridge, commented that there are many reasons to justify the increase of the income level in the brackets. Social Security has cost of living raises every year of 4%. Our income tiers need to reflect this and other reasons for increases in this area. Gordon also discussed stats about state taxes and that 14% of pension and annuity income is exempt from state income tax. With after 7 years, 100% of this being exempt.

VIII. Adjournment

Motion by C. Perham to adjourn the meeting. Seconded by McDermott. Unanimously passed. The meeting was adjourned at 9:21 p.m.

Respectfully submitted,

Cindy Perham, Secretary