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Senior and Disabled Tax Relief Committee Meeting Minutes
Location: 1st floor Conference Room, Sullivan Independence Hall
October 9, 2018 7:30 pm

I. Call to Order

Present: Michael Herley, Cindy Perham, Peter Tallman, and Jill Vergara, and Mark McDermott.
J. Vergara called the meeting to order at 7:35 p.m. and took roll call.

II. Pledge of Allegiance

III. Approval of the Minutes, September 4, 2018

1. J. Vergara moved to accept the Minutes from the 9/4/2018 meeting. P. Tallman seconded.
Passed unanimously

IV. Review research and any additional findings, including Finance Department input

Discussion regarding the most monies paid out to Fairfield Senior Tax relief – Chairman J. Vergara mentioned that in 2014, we paid out \$4.2 million in Senior Tax relief benefits, with \$3.7 being the 2017 total.

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

a) Credit Program

- 1) Raise qualifying income to 100K (with 15% tax credit; and \$1000 cap)

With the changes we would be adding one income bracket to up to 100K.

J. Vergara discussed how she doesn't want to go to the RTM with an income cap and have it be negotiated down. She wants to broaden the caps, also increase the Deferral Program and make a difference by looking at the long-term residency programs that other towns offer.

- 2) Raise Tax credit percentages and corresponding caps of existing brackets will need to be increased with our proposal to the RTM.

b) Freeze Program – Elimination of this program will be advised, as no one participates in it.

c) QTAV Eligibility requirement – Discussion regarding getting rid of this qualification and using 200% of the median assessment value of the homes in Fairfield with those who are above that amount and currently receiving benefits to be grandfathered in. J. Vergara said that the median assessment would be approximately \$437K with 200% being just under \$875K.

d) Hardship Exception – We talked about how the Assessor's office has heard many hardship cases, but we really need to get parameters for this type of exception on paper in the future.

e) Miscellaneous edits -We continued to discuss the potential cost of the changes to the program.

J. Vergara made a motion to add a new tier to the income bracket of \$73,601 - \$100,000, and that the benefit caps be increased 10% with the new bracket having a \$1,400 cap. The other caps are as follows;

Income up to \$73,600 Cap \$1,900

Income up to \$53,300 Cap \$2,500

Income up to \$45,000 Cap \$3,200

Income up to \$37,000 Cap \$4,000

Income up to \$31,000 Cap \$4,200

Income up to \$25,000 Cap \$5,000

Income up to \$17,000 Cap \$5550

M. McDermott seconded the motion. Discussion ensued, and J. Vergara asked for public comment.

VI. Public Comment

Gordon Mackenzie, of 11 Palmer Bridge Road, gave feedback on the Consumer Price index.

Urb Liemkuhler, of 83 Spruce Street, confirmed the income and caps we proposed.

Nancy Legare, 245 Unquowa Road (Mosswood Condo unit #47) said she was happy to attend and would be at the Senior Center the following day for the public forum. She added that many of her friends have sold and now rent in town or other towns. In many cases, they would have liked to stay (downsize) in Fairfield.

John Wynne of 144 Harbor Road was present and confirmed the 200% of median assessed value.

Bill Lenahan, of 42 Alma Drive, reiterated the return on investment that seniors bring to our town. He stated that if a senior moved out of Fairfield, the cost to the town for subsequent years without that senior may cost the town an average of 10K annually. Bill also reminded us that when people turn 70 ½ and need to take out their retirement distribution, this changes their income, of course.

The vote was taken of the committee, and the new proposed income and benefit caps passed unanimously.

J. Vergara made a motion to pass the assessment limit 200% of the median value, approximately \$875K instead of quantifying the QTAV. C. Perham seconded it, and it passed unanimously, with all those who already get Senior Tax relief being grandfathered in.

VII. Discussion of Public Forum – October 10, 2018 at 10 am at the Bigelow Senior Center

VIII. Adjournment

Motion by C. Perham to adjourn the meeting. Seconded by P. Tallman. Unanimously passed. The meeting was adjourned at 9:20 pm

Respectfully submitted,

Cindy Perham, Secretary