

# Senior and Disabled Tax Relief Committee Meeting Minutes for December 6, 2016

Location: 1<sup>st</sup> Floor Conference Room, Sullivan Independence Hall at 7:30 p.m.

Present: Alex Durrell, Hank Ference, Dru Georgiadis, Cindy Perham, Jill Vergara and Carol Way

Absent: Mark McDermott

## I. Call to Order:

Chairman Hank Ference called the meeting to order at 7:34 p.m. and Carol Way led the committee in the Pledge of Allegiance.

## II. Approval of Minutes:

The Committee approved the minutes as filed.

## III. Old Business

### A. Update on some past topics

1. Jill Vergara gave a summary of another community with a "Homestead-style" credit
  - a. Jill's reporting gave details on the Town of Ridgefield
  - b. While Ridgefield (22,000) is much smaller than Fairfield (61,000), Jill related that they make a flat amount of \$1,500 per senior aged 65 or older and who have been permanent residents for one year or more. This is considerably smaller than the average amount of credit that a Fairfield qualifying senior receives. The median price of a home in Ridgefield is \$147,000 in contrast to \$570,000 in Fairfield. Ridgefield was added to Redding, CT and Scituate, RI which had already been discussed in a previous meeting.
  - c. John Wynne of
2. Name-change consideration was mentioned briefly. Several previous participants from the public had requested that we consider calling the program A Senior & Disabled Retention and Incentive Program. **Helen D'Avanzo of 1446 Jennings Road** stated that she had not heard of any request to change the name and saw no need for a name change. She also mentioned that we have a generous deferral program and that we should encourage more people to participate in it. When it was mentioned that people seem turned-off by the prospect of a lien on their property she reminded people that this may allow them to stay in their home, but still protect the Town's right to taxes. Helen mentioned Westport's deferral program which is used by their residents, as an example where it is working.
3. Carol Way shared a document from the Assessor's office that showed the reasons for persons not renewing during the most recent application process. The reasons were varied: 22 Deceased; 8 Assets exceeding \$650,000; 31 Sold homes; 23 Over income level allowed; 31 No reap at date required. This brought up the recurring situation that some homeowners who have had emergency needs for money and have taken amounts from IRAs or 401 Ks, have then been rejected because of too much income. **Urb Leimkuhler of 83 Spruce Street** suggested that we establish certain emergency situations which could be accepted as a one-time event and that should include Federal government requirements of taking a minimum payment from such accounts after age 70 1/2 which also may cause them to exceed the allowed income amount.
4. There was more discussion of the number of days spent in the home annually in order to be eligible for this tax relief program. Carol Way suggested that as long as Fairfield and Connecticut is their official place of residency, in other words, that they reside here for a minimum of 183 days a year rather than 265, that they should be able to apply for this tax relief program.
5. **John Wynne of 144 Harbor Road** suggested that some sites that Fairfield Senior Advocates have found have given more cities and towns for comparisons. He will share such sites with the committee.

## IV. New Business

- A. Retirement of Don Ross was discussed. His last day was November 21<sup>st</sup> in Fairfield, but he is now the Tax Assessor for the Town of Brookfield CT. We do not know how soon a new Tax Assessor will be hired. This may put a slight delay on creating a policy manual/handbook for our program.
- B. The Committee accepted the resignation of Carol Way as Secretary. Hank Ference nominated Dru Georgiadis. Her election was unanimous.

## V. Adjournment

The meeting was adjourned at 9:05 p.m.

Respectfully submitted,  
Carol Way, Secretary