

Senior Tax Relief Minutes

Cindy Perham [<mailto:cindyperhamrtm2@gmail.com>]

Sent : Tue 1/8/2019 1:16 PM

Senior Tax Relief Minutes/ the Education Center, 501 Kings Highway East

December 10, 2018

Chair, Jill Vergara, called the meeting to order at 8:25 pm.

Roll was taken by J. Vergara;

M. Herley, M. McDermott, C. Perham, P. Tallman were all in attendance.

The meeting was televised on FairTV as well

To hear and consider for the first time amendments to the Tax Relief for the Elderly and Disabled Homeowners Ordinance, Section 95-7 to Section 97-15.4 of Chapter 95, Article III, of the Code of the Town of Fairfield, sponsored by the Senior & Disabled Tax Relief Committee: Cynthia Perham, District 2; Mark McDermott, District 7; Jill Vergara, District 7; Peter Tallman, District 8; and Michael Herley, District 10

M. Herley said that he was disappointed that Bob Mayer could not attend our meeting this evening.

P. Tallman also indicated he was disappointed regarding Mr. Mayer's attendance. He also feels that with a 47% participation rate currently, we really only should assume that this will go up to maybe 50%, not the 94% that Mr. Mayer figures would apply and possibly qualify.

J. Vergara moved that we lower the \$880,000 assessment limit qualifying guideline to \$750,000. Seconded by C. Perham.

Discussion ensued with M. Herley getting clarification on the cap of 2.5% that would be reduced to 1.6% of the town's taxes levied.

J. Vergara amended her motion to include;

Assessment limit reduced from 880K to 750K

Income limit reduced from 100K to 90K

Cap on total expenditure not to exceed \$4.2 million, or 1.6% of the total town budget.

In addition, the cap on the new bracket, \$73,601 – \$90,000 income level will cap out at \$1200, reduced from \$1,400.

Public Comment;

Bill Lenahen, 72 Alma Dr supports the committee's work. He added that through his research he found that 91% of those in their 50% have no pensions, and many Fortune 500 companies have reduced offering pensions. In the past 50% of them offered pensions, and now it is fewer than 5%.

Urb Liemkuhler, 83 Spruce Street, representing Fairfield Senior Advocates (FSA) feels that the income cap we are adding is close to the median Fairfield income. He added that the 90K income cap is safer to transition to and that he supports the committee's work.

M. Herley suggests that we vote on these issues separately.

J. Vergara indicated that the proposed income limit bracket changed from \$73,600, but changed to \$75,300, including the annual inflation increase.

J. Vergara moved that the new bracket we are adding, be changed to \$75,300 - \$90,000.

M. McDermott seconded it.

M. Herley reiterated that Mr. Mayer's projections are extremely high as to how many seniors will apply for tax relief under the new parameters. Although Mr. Mayer is concerned about getting rid of the QTAV test, his revenue loss estimation seems high. Once again, he is disappointed that Mr. Mayer is not present today to discuss the changes he wants our committee to make.

Passed unanimously.

J. Vergara then moved that the cap of relief on this new bracket be \$1200. M. McDermott seconded, and it passed unanimously.

J. Vergara moved that the qualifying assessed value be \$750K for applicants. M. McDermott seconded, and it passed unanimously.

Another new revision, J. Vergara changed the town cap of relief vs. taxes levied from 2.5% to 1.6%. M. McDermott seconded, and it passed unanimously.

M. McDermott asked if these changes should be reviewed annually to make sure the caps keep up with the program's needs.

M. Herley feels that Mr. Mayer making these changes to our proposal in the 11th hour and not being here to support the numbers he provided is not a good thing.

J. Vergara added that many RTM members, she included, ran on Senior's vitality and well being and ability to stay in town.

Once again, it was brought up that 47% of 65+ Fairfield households participate in the Senior Tax Relief. If all those who meet the new assessment limit apply and qualify, the figure that we would forecast could be an issue. Therefore, we are looking into a cap of \$4.2 million or 1.6% of the total grand list.

J. Vergara next discussed Section 95-11 Amount of relief granted through program limited.

The total of all relief granted under the provisions of these programs shall not exceed an amount equal to 2.5% of the total real property "TAX LEVIED" to be changed to "ASSESSED" in Fairfield in the preceding fiscal year. This was a suggestion of Assessor, Ross Murray. This will be discussed further at our next meeting after speaking to R. Murray.

Per an email from R. Murray at 4:15 pm on 11/20, he said that the vendor the town uses for assessing the tax, has an option to prorate, depending on how we need it done. They only need 3 weeks advance notice.

Comment from Majority Leader, Phil Pires, District 4. Phil was interested in us looking at a 3 year phase-in. J. Vergara said that with no changes made since

2013 to this Senior Tax relief ordinance, the committee really wants to make substantive changes for seniors now.

With that, J. Vergara made a motion to alter the ordinance to read that the program shall not exceed an amount equal to 1.6% of the total real property tax levied (or assessed) in Fairfield in the preceding year, with a cap of \$4,242,415. C. Perham seconded it. J. Vergara, M. McDermott, C. Perham, and P. Tallman approved. M. Herley abstained. Passed.

J. Vergara made a motion to adjourn. M. McDermott seconded. Unanimously passed.

Meeting adjourned at 9:38 pm.

Respectfully Submitted,

Cindy Perham, Secretary