

## **Income Worksheet Checklist for the Senior Citizens and the Disability with Limited Income Exemptions**

The above exemption programs are based in large on financial need.  
**Submit copies of all items for the year 2024, for the 2026 exemption.**

**If you file income taxes, please include the following with your renewal if applicable:**

- Federal Individual Income Tax Return
- Schedule 1
- Schedule A – if you itemize your medical expenses
- Federal or NYS Partnership of S Corporation Income Tax Return
- Income from Estates or Trusts
- Social Security (Form SSA 1099)

**If you DO NOT file income tax please include the following with renewal if applicable:**

- Social Security Statement (Form SSA 1099)
- Salary or Wages (W-2) including bonuses and/or tips
- Retirement/ Pension(s)/ Annuity payments (Form 1099)
- Railroad Retirement
- Interest or Dividend-bearing Checking and/or Savings Accounts (1099)
- Ordinary Dividends and Interest on Investments (1099)
- Capital Gains from Sale or Exchange of Investment(s)
- Business Income (must show both income and expenses)
- Rental Income and Expenses
- Alimony or Support Payments
- Unemployment Compensation
- Jury Duty
- Lottery/Gambling Winnings
- Veteran’s Income (taxable)
- Other taxable income

If you **do not** file income taxes please fill out the worksheet [RP-467-Wkst available on the New York State Department of Taxation and Finance web site.](#)

*OVER*

***IRA income**, from your year-end statement, will **NO LONGER** be counted in the income calculation, whether you take a distribution or not. We **NO LONGER** count **workers compensation** income in the exemption income calculation.*

If you are claiming **unreimbursed medical expenses**, please provide written documentation or a Schedule A if filed. Examples of medical expenses would be: Medicare, insurance, prescriptions, doctor bills or co-pays, dental expenses, eye care expenses, hospital expenses or any other medical procedures, not including cosmetic surgery, which were not covered or reimbursed by insurance. Over the counter medicines are not to be included, only items covered by insurance. Please keep all of your receipts together and handy in case of an audit.

**Maximum Annual Gross 2024 Income less medical expenses for your 2026 exemption is \$58,400 which is the state maximum**

Albany County limit \$58,400

Town of Bethlehem limit \$37,400

Bethlehem CSD limit \$37,400

Guilderland CSD limit \$37,400

RCS CSD limit \$42,400

These limits are all subject to change

*Due to new regulations and auditing of NYS Assessors' offices we **cannot accept** your application until it is **complete** with all the required documentation.*