



# City Of Richmond

Department of Finance

## Tax Relief For The Elderly And Person With Disabilities





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### Program History

- Eligible applicants can receive:
  - A percentage-based reduction on their real estate taxes
  - Monthly credit for Solid Waste and Recycle fees on their utility bill with the Department of Public Utilities
- Finance ongoing collaboration with other departments within the City of Richmond to assist our seniors and persons with disabilities:
  - Council Members and District Liaisons
  - Department of Aging & Disability Office
  - Department of Social Service
- Continued outreach: various fairs, community programs, Television Call-A-Thons and neighborhood events



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### 2021 Program Statistics

|                            |       |
|----------------------------|-------|
| Total Applicants           | 2,334 |
| Approved Applicants        | 1,881 |
| Rescinded/Rejected         | 453   |
| Approved at 100% Exemption | 1,271 |
| Approved at 75% Exemption  | 320   |
| Approved at 50% Exemption  | 197   |
| Approved at 25% Exemption  | 93    |

In tax year 2021, **68%** of all approved program participants were completely exempt from paying real estate taxes.

**217** participants applied as a person with disabilities, **1664** applied as elderly.

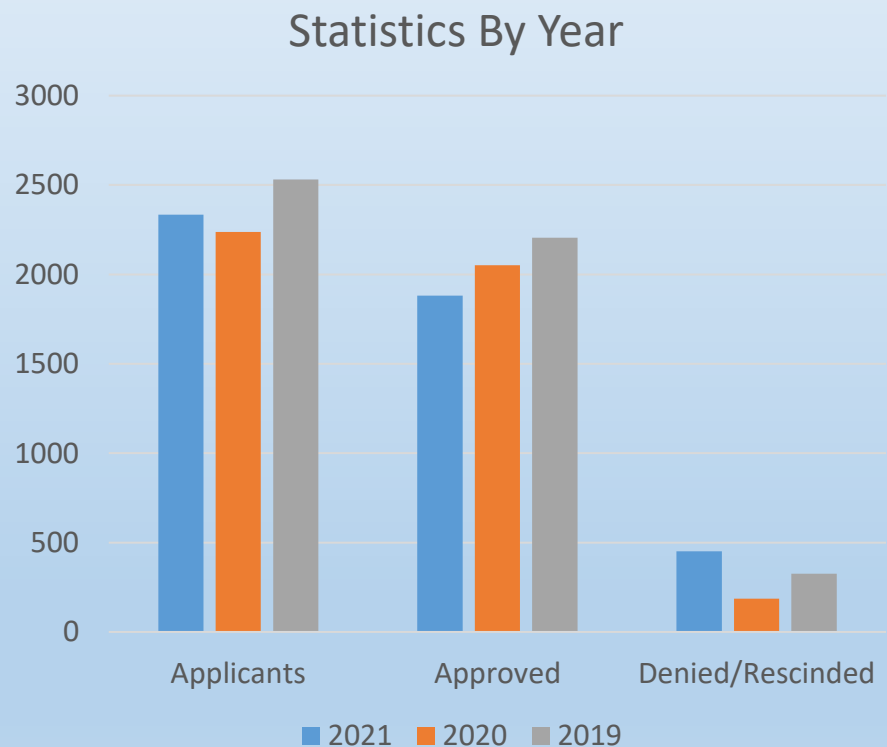
**\$3,475,996** in Tax Relief was award for the 2021 tax year.



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### Historical Information



#### Applicants

**2021:** 2,334

**2020:** 2,238

**2019:** 2,531

#### Approved:

**2021:** 1,881

**2020:** 2,052

**2019:** 2,206

#### Denied/Rescinded:

**2021:** 453

**2020:** 186

**2019:** 325



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## Current Eligibility Requirements

- Program enrollment opens – **January 1<sup>st</sup>**
- Deadline for applications and annual recertification affidavits – **March 31<sup>st</sup>**
- First time applicant deadline – **June 15<sup>th</sup>**
- Hardship applicant deadline – **June 15<sup>th</sup>**
- Mailing applications and brochures – **first week of January**
- Mailing rectification affidavits – **last week of December**



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## Current Eligibility Requirements

- Outreach efforts – **January through March**
- Send out notifications for non-payment rescinds – **July 1<sup>st</sup>**
- Execute rescinds for non-payment – **July 15<sup>th</sup>**
- Outreach to program enrollees who have not submitted required documentation –  
**N/A**



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## Proposed Changes Of Eligibility Requirements

- Program enrollment opens – **No Change**
- Cutoff for applications and annual recertification affidavits – **December 31st**
- **First time** applicants & **Hardship** applicants deadline – **N/A**
- Mailing applications and brochures – **No Change/ first week of January**
- Mailing rectification affidavits – **No Change/last week of December**



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## Proposed Changes Of Eligibility Requirements

- Outreach efforts – **Year-Round**
- Send out notifications for non-payment rescinds – **July 15th**
- Execute rescinds for non-payment – **July 31st**
- Outreach to program enrollees who have not submitted required documentation –  
**Quarterly: April/July/October**



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## Future Program Components





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## Future Program Components

- Three year cycle for participants
- 65 years of age – as of December 31<sup>st</sup> of the previous year; or permanently and totally disabled
- Property title must be held or partially held by January 1<sup>st</sup> by applicant
- Property must be owner occupied
- Gross combined income of the household cannot exceed \$60,000 from the previous year



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## Future Program Components

- Total combined financial net worth as of December 31<sup>st</sup> of previous year shall not exceed \$350,000
- Payment amounts must be paid by January 14<sup>th</sup> for the 1<sup>st</sup> half
- Payment amounts must be paid by June 14<sup>th</sup> for the 2nd half
- Payment extension for physical or mental impairment or extreme hardship
- Effective date of January 1<sup>st</sup> of each year



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## Future Program Components

### Application Criteria – No Change:

- Age/Income/Net Worth limitations
- Location, assessed value and tax on property
- Names of related persons in residence
- Desire for freeze or exemption

### Exemption Amount (Range of Income) - No Change:

- |                       |                |
|-----------------------|----------------|
| • \$0 - \$30,000      | 100% Exemption |
| • \$30,001 - \$40,000 | 75% Exemption  |
| • \$40,001 - \$50,000 | 50% Exemption  |
| • \$50,001 - \$60,000 | 25% Exemption  |

# QUESTIONS?

