

REQUIRED DOCUMENTS FOR ELDERLY EXEMPTIONS

INCOME DOCUMENTS:

- 1) **Social Security Statement of Benefits showing the previous year's total benefits received**
- 2) **Proof of all sources of income:**
 - W2**
 - 1099**
 - Year end pension/annuity statement**
 - Proof of withdrawals from IRA, 401K, 457 retirement**
 - Rental Income**
 - Capital Gains/Dividends**
 - Gambling winnings**
- 3) **Latest Federal Income Tax Return (if applicable) and all documents used to complete it**

ASSET DOCUMENTS:

- 1) **Most recent detailed bank statements for any and all Checking and Savings accounts**
- 2) **Statement showing current market value of any:**
 - Stocks**
 - Bonds**
 - Certificates of Deposit**
 - Annuities**
 - IRA, 401K, 457 accounts**
- 3) **List and approximate market value of all real-estate other than primary residence**
- 4) **List of all motor vehicles, including recreational vehicles and a copy of vehicle registration and mileage on each vehicle**
- 4) **Copy of insurance certificate or appraisal for all jewelry/objects of art requiring special insurance riders**

TRUST DOCUMENTATION:

If your property is in a trust you must bring the trust document with you.