



Due by - Taxable Status Date:
March 1

WORKSHEET

Income Limit:
\$58,400

Income Does NOT Include:

- Supplemental Security Income
- Welfare Payments
- Gifts, Inheritances
- Payments received as participant in Federal Foster Grandparents Program
- Return of Capital
- Reparation Payments received by Holocaust Survivors
- IRA Distributions

Income Includes:

- ALL Social Security Payments (Salary & Wages including Bonuses)
- Interest including Non-Taxable Bonds
- Total Dividends
- Income from Estate or Trusts
- Gains from Sales or Exchanges
- Total Received from Gov. or Private Retirement or Pension Plans
- Annuity Payments
- Alimony
- Unemployment Insurance
- Disability Payments
- Workers Compensation

Income of each owner and spouse for the 2021 income tax year must be listed below. IF OWNER OR SPOUSE FILED A 2021 [1040] FEDERAL INCOME TAX AND [IT-201] NEW YORK STATE RETURN, PLEASE ATTACH COPIES OF PAGE 1 & PAGE 2 FOR BOTH RETURNS. IF NOT, ATTACH A COPY OF 1099 SOCIAL SECURITY STATEMENT(S) AND ALL OTHER 1099 INCOME DOCUMENTS. **INFORMATION FOR EACH APPLICANT MUST BE FROM THE SAME TAX YEAR.**

SOURCE OF INCOME	APPLICANT	SPOUSE	TOTAL
Social Security (1099-SSA box 5) (Line 6a on the 2020 – 1040)	\$	\$	\$
Government Pension			
Employee Pension			
Wages			
Unemployment			
Interest on Savings, Notes, Bonds			
Annuities			
Stock Dividends			
Capital Gain			
Rental Income			
Household Contribution			
Workers Compensation			
Disability			
Veterans Affairs Income			
Are there any school age children attending school from this address?	Yes: _____ Grade: _____ No: _____		Total = MUST BE LESS THAN 58,400

Signature: _____ Date: _____ Signature: _____ Date: _____