



Andrew J. Maglio Mayor
Patty Burns Village Clerk

January, 2020

Dear Sir or Madam:

Several years ago, the Village Board by ordinance approved a senior citizen utility tax rebate program. The intent of the program was to provide relief of utility taxes paid by senior citizens who are at or below the Section 8 Poverty Level. All applications will go through an approval process before they are submitted for reimbursement.

The following Section 8 Poverty level income guidelines have been established by the DuPage Housing Authority.

One person household	\$31,200
Two person household	\$35,650
Three person household	\$40,100
Four person household	\$44,550

To qualify for the program, the total gross income of every member in the household will be taken into consideration. Income includes, wages, unemployment, workers compensation, disability benefits, pensions, social security, interest income, dividends and gains on investments and income on rental property. Total of all income must be at or below the poverty level as established by the DuPage Housing Authority.

All outstanding obligations with the Village will also need to be current prior to processing applications. This includes water/sewer bills, parking tickets, and any other outstanding debt due to the village. **Vehicle stickers must be purchased for each vehicle registered to your address.**

For an applicant who becomes 65 years old during the year for which an application is filed or moved in during the current rebate year, reimbursement will be prorated based on the month the applicant turned 65 or moved into the village.

All applicants must be a current resident of Roselle and reside within the Village at the time the application is approved.

Completed applications, accompanied by documentation listed on the instruction sheet, must be submitted to our office by April 30, 2020 during regular business hours. You may submit your application by mail or drop it in the 24-hour drop box located in front of the Village Hall. **Do not send originals through the mail or drop box.** All applications will go through an approval process before they are submitted for reimbursement.

Enclosed is an application for the 2020 Senior Citizen Utility Tax Rebate for taxes paid in 2019. Please read the attached instructions carefully and attach all necessary documents before submitting your application. If you have any questions, please call our Customer Service Staff at (630) 980-2000. Press 2 for Finance.

January, 2020

SENIOR CITIZEN UTILITY TAX REBATE INSTRUCTIONS

POLICY: The Village of Roselle deems it in the interest of the community to provide for relief of utility taxes at an annual rate to senior citizens who are at or below the Section 8 Poverty Level Income Guidelines as established by the DuPage Housing Authority. An eligible applicant must be age 65 or older; head of household, and a homeowner or renter who pays utility bills subject to the Roselle Municipal Utility Tax. Qualifying residents will receive a **rebate of \$85.00.**

PROCEDURES:

1. Applicants must complete the attached application form.
2. Applications must be submitted by April 30 following each calendar year. For 2020, applications must be submitted by April 30, 2020. No exceptions. Checks will be mailed out in June of 2020.
3. Applicant must provide proof of the following:
 - a. Age – Driver’s license, birth certificate, Medicare card or other acceptable form of identification.
 - b. Residency – provide a current: 1) property tax bill **or** 2) lease corresponding to the address for which the utility bills were paid by the resident and for which reimbursement is requested.
 - c. Income – **Total gross income** must be provided for every household member. Please **attach copies** of the following documents for each household member to your application:
 - 1) Copy of filed US 1040 income tax return
 - 2) Social Security Benefit Statement SSA-1099
 - 3) W-2s
 - 4) 1099-R Pension Statement, IRA Statement
 - 5) 1099-INT
 - 6) 1099-DIV
 - 7) 1099-MISC

Copies must be attached. The Finance Department will be happy to make copies at no charge.

Applications must be submitted to our office, by April 30, 2020 during regular business hours. You may also submit your application by mail or drop it in the green 24-hour drop box located in front of the Village Hall near the circular driveway.

**VILLAGE OF ROSELLE
SENIOR CITIZEN UTILITY TAX REBATE**

1. Name: _____ 2. Date: _____

3. Address: _____ 4. Phone: _____

5. Names and ages of all persons who reside at above address:

Name	Date of Birth	Years Lived In Roselle	Verified by
_____	_____	_____	_____
_____	_____	_____	_____

Applicant must provide proof of age when submitting application. Please present driver's license or other proof of age for verification.

Verified by _____

6. Provide copy of Property Tax Bill or Lease

Applicant must provide copy of property tax bill or lease corresponding to the address for which utility bills were paid for verification.

7. Verification of Income:

Social Security Amount \$ _____
Enter One-Half of Social Security \$ _____
Enter Total Amount of any Income Including:
a) Total Wages W-2s \$ _____
b) Bank Acct. Interest 1099-INT \$ _____
c) Dividends 1099-DIV \$ _____
d) Pensions 1099-R \$ _____
e) IRAs 1099-R \$ _____
f) Capital Gains Distributions \$ _____
g) Other \$ _____

Total Amount of Income for 2019 \$ _____

Verified by _____

Attach a copy of that portion of U. S. tax return and all other documentation which totals to the adjusted gross income for 2019.

I hereby certify that all information provided as part of this application is true and correct.

Resident's Signature _____

If applicant was not required to file a federal income tax return, please sign below.

I hereby certify that I was not required to file a federal income tax return for the tax year 2019 because my income fell below the federal filing requirement level.

Resident's Signature _____