

## Allowable Deductions

We may be able to deduct any non-reimbursed expenses paid by you, your spouse or domestic partner.

- ◆ Please provide receipts or copies of checks for in-home care—caretaker, nurse visits, weed pulling, lawn care, snow shoveling, window washing, house cleaning expenses.
- ◆ Prescriptions (that you paid for out of pocket) call your pharmacy for a print-out
- ◆ Insurance premiums for Medicare (this is paid through Social Security on the end-of-year 1099 Form)
- ◆ Please provide receipts or invoices for Rest Home or Adult Family Home Expenses
- ◆ Medicare supplemental/Medigap insurance
- ◆ Durable medical and mobility enhancing equipment and prosthetic devices
- ◆ Medically prescribed oxygen
- ◆ Long-term care insurance
- ◆ Cost-sharing amounts (deductibles, co-pays, etc.)
- ◆ Nebulizers
- ◆ Medicines of mineral, animal and botanical origin prescribed, administered, dispensed, by a naturopath licensed under Washington law
- ◆ Ostomic items
- ◆ Insulin for human use
- ◆ Kidney dialysis devices
- ◆ Disposable devices used to deliver drugs for human use
- ◆ Dental prostheses including full & partial dentures, crowns, inlays, fillings, braces, retainers



If you are a senior adult or a disabled person and own your primary residence in Washington State you may qualify for Chelan County's "Property Tax Exemption for Senior Citizen and Disabled Persons" program that helps reduce the payment of your property taxes. Under the exemption program, the value of your property is frozen (or "capped") at the year you qualify. That means if your assessed value increase, you will only pay taxes on the frozen value. Should your assessed value decrease you will pay taxes on the new assessed value. However, if you have new construction on your property, it will be added to your frozen value in the year it was completed.



## Chelan County Property Tax Reduction Program for Senior Adults and Disabled Persons



Chelan County Assessor  
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Program Administrator: 509-667-6364  
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## How do I Qualify?

### **Age OR Disability** **You must meet one of the following:**

- ◆ Age 61 or over by December 31st of the *prior* year (must provide proof of age) **OR**
- ◆ 80% or higher military service-connected disability (must provide VA Disability Letter) **OR**
- ◆ Social-Security– deemed disabled or letter of disability from your doctor (must provide disability letter from Social– Security or Doctor)

## Ownership & Residency

You must own and occupy the home in Washington state for which the exemption is claimed in total (fee owner), as a life estate (including a lease for life), or by contract purchase by **June 30th of the assessment (prior) year.**

A home owned jointly by a married couple, a registered domestic partnership or by co-tenants is considered owned by each spouse, domestic partner, or co-tenant. Only one person must meet the age or disability requirements. A co-tenant is a person who resides with the claimant and has ownership interest in the residence. Income information for the co-tenant must be provided.

- ◆ The property must be your primary residence at the time of your application and you must occupy the home for more than **6 months** each year.
- ◆ Properties used as a vacation home are not eligible for the exemption program.

## Income

Your annual *household combined* disposable income cannot exceed **\$48,000.**

### **LEVEL 1: \$0 – \$35,000**

If your annual income for the assessment year (last year) is UNDER \$35,000, your home will be exempt from regular levies on \$60,000 or 60% of your home's assessed value– whichever is greater.

**For Example:** your annual income is \$18,000 and your assessed home value is \$150,000. Your taxable property value will be \$60,000.

### **LEVEL 2: \$35,001 – \$41,000**

If your annual income for the assessment year (last year) is between \$35,001 and \$41,000, your home will be exempt from regular levies on \$50,000 or 35% of your home's assessed value, whichever is greater.

**For Example:** your annual income is \$36,000 and your assessed home value is \$150,000. Your taxable property value will be \$97,500.

### **LEVEL 3: \$41,001 - \$48,000**

If your annual income for the assessment year (last year) is between \$41,001 and \$48,000, your home will be exempt from all excess and special levies.

## How do I Apply?

To apply, please bring in your IRS Tax return or an Official IRS Tax transcript and all supporting documentation.

If you **do not** file an IRS Tax Return, please gather the items below that pertain to you:

- ◆ Social Security end-of-year 1099 Form
- ◆ Pension or Annuity end-of-year 1099 Form
- ◆ Interest Income end-of year 1099 Form
- ◆ IRA Income
- ◆ Disability Letter from Social Security or Doctor
- ◆ Unemployment Benefits
- ◆ VA Disability Letter
- ◆ Military Benefits
- ◆ Life Estate Document/ Deed
- ◆ Revocable, Irrevocable or Living Trust Documents
- ◆ Receipts of any other income you might be receiving within your household
- ◆ (this includes rental, business and/or income from all of those residing in the home)
- ◆ 2 Forms of ID (one must contain a photo and address)
- ◆ **Please see the allowable deductions located directly on the back of this page.**

Once you have all of the items checked above, please bring them to the Chelan County Assessor's Department and we will complete the application for you along with explaining the program in detail.