



**5. 2023 HOUSEHOLD INCOME** (all applicants)

Include all income of all members of the household listed in Section 4. Attach Copies of all year-end income statements. Attach a complete copy of your 2023 federal tax return including all W2s/1099s, schedules, and documents used to process your tax return.

Check here if you did not file a Federal Tax Return

- Adjusted Gross Income per 2023 Federal Tax Return \_\_\_\_\_/year
- Social Security, Medicare, Railroad Retirement, or Military Retirement \_\_\_\_\_/year
- Gross pension benefits (including Veterans Disability Compensation) \_\_\_\_\_/year
- Dividend and interest income including any nontaxable interest received \_\_\_\_\_/year
- Capital gains excluded from Adjusted Gross Income \_\_\_\_\_/year
- Loss carry forwards and residential depreciation claimed on your Federal Tax Return \_\_\_\_\_/year
- Welfare, Worker's Compensation, alimony, child support and strike benefits \_\_\_\_\_/year
- Earned income credit and other credits claimed on your Federal Tax Return \_\_\_\_\_/year
- Wages, salaries, and other employee compensation \_\_\_\_\_/year
- Gross amount of annuities and trust income received \_\_\_\_\_/year
- Withdrawals and distributions from 401(k), 457, or IRA accounts \_\_\_\_\_/year
- Voluntary contributions to a tax-deferred retirement plan \_\_\_\_\_/year
- Business and rent income: Rent \_\_\_\_\_% Business \_\_\_\_\_% \_\_\_\_\_/year
- Other income \_\_\_\_\_/year
- Income from other members of household not included above \_\_\_\_\_/year
- **Total 2023 Household Income** \_\_\_\_\_/year

(NOTE: Any adult household member who cannot provide the above listed documentation must submit an IRS wage and income transcript and/or Social Security earnings history).

**6.2023 HOUSEHOLD ASSETS** (all applicants)

Attach copies of all household asset statements which must reflect end of Dec 2023 balances. Also, please provide closing statements on all accounts closed in 2023.

- Checking accounts \_\_\_\_\_
- Any savings and credit union accounts \_\_\_\_\_
- Balances in 401(k), 457, and IRA accounts \_\_\_\_\_
- Market value of investment accounts (All balances in annuity, NOW, mutual funds, etc.) \_\_\_\_\_
- Securities (including stocks and bonds) \_\_\_\_\_
- Trusts (value of assets) \_\_\_\_\_
- Partnerships and other business interests \_\_\_\_\_
- Describe rental property or real estate other than the residence on which relief is requested \_\_\_\_\_

**Certification**

I/We hereby swear subject to penalties of perjury and other legal and civil penalties that the information provided herein is complete, true and correct. I/We agree and understand that the information provided is subject to verification by Salt Lake County as a consequence of this application for tax abatement. I/We hereby authorize Salt Lake County to inspect and/or receive confidential tax information in any office of the IRS or the Utah State Tax Commission and to inspect and/or receive banking and investment information from any financial or securities institution holding such information. A copy of this signed application may be relied on as my consent to the inspection or receipt of such records.

Applicant \_\_\_\_\_ Date \_\_\_\_\_ Spouse \_\_\_\_\_ Date \_\_\_\_\_

Mail or deliver the completed form and related financial documents to:

**Salt Lake County Treasurer - Tax Relief Department | PO BOX 144575 | Salt Lake City, UT 84114-4575**