

**Sheila Srivastava, CPA
Salt Lake County Treasurer**

**2025 SENIOR DEFERRAL
APPLICATION**

*NOTE: A new application must be filed each year.
The deadline to apply is September 2, 2025*

Web: http://slco.to/treasurer
Email: taxrelief@saltlakecounty.gov
Phone: (385) 468-8300 (Option #2)
Fax: (385) 468-8301
Hours: 8AM - 5PM
Address: 2001 S State St., #N1-200
PO Box 144575
SLC, UT 84114-4575

APPLICATION ID: _____
Received: _____
Entered: _____
Audited: _____
Screen Audit: _____
(Office Use Only)

(Office Use Only)

1. APPLICANT

Last Name	First	Initial	Birth Date	SS#
Mailing Address			Resident Address	
City, State, Zip			Phone	Email
Spouse Name	Birth Date	Death Date (if applicable)	SS#	

2. OWNERSHIP Real Property (residential) Parcel #: _____ *If the property is held in a trust and the current trust agreement is not on file with the Treasurer's Office, you must provide a copy of the trust agreement before relief may be granted.*

3. AFFIDAVIT I/We hereby certify the following: (mark all which apply)

- I am a United States Citizen.
- I am a qualified alien as defined in 8 U.S.C., Sec.1641 and lawfully present in the United States.
My Alien Registration Number is _____ . My I-94 Number is _____
(New applicants who are qualified aliens must provide copies of their immigration documents)
- I am a homeowner age 75 years or older before January 1, 2026

3a. Ownership requirements (all applicants must fill this section out)

- I owned and occupied the residence described above on January 1, 2025 as my primary residence.
- The assessed value of my property is no greater than the Salt Lake County median property value of \$529,100 OR it has been my primary residence for 20 consecutive years or more.
- I have not applied for tax relief in any other county in Utah.

3b. Income and Assets (all applicants must fill this section out)

- My household liquid assets are less than 20x's the preceding calendar year tax liability on the property.
- My household income did not exceed \$85,246.00 in the preceding calendar year.
- I have not transferred assets or made gifts of property to any relative/trust fund within the past 3 years.
(If you have please provide a statement with complete details of all transfers)

3c. Property Liens (all applicants must fill this section out)

- If applicable my mortgage company or reverse mortgage company has filled out the enclosed approval form in order for my deferral to be granted.

Mortgage Company:
Address:

Mortgage Account Number:
Mortgage Maturity Date:

My approximate mortgage balance is \$

My monthly mortgage payment is \$

- I have no mortgage loan secured by my primary residence.
- I currently have no delinquent taxes due on my property.
- I acknowledge that if my application is approved a lien will be recorded on my property for the taxes owing.

4. LIST ALL PERSONS LIVING IN HOME INCLUDING YOURSELF AS OF JANUARY 1, 2025

Name	Age	Self	Name	Age	Self
Name	Age	Relationship	Name	Age	Relationship
Name	Age	Relationship	Name	Age	Relationship

5. 2024 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 2024 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 2024 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 2024 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).

6.2024 HOUSEHOLD ASSETS (all applicants)

Attach copies of all household asset statements which must reflect end of Dec 31, 2024 balances. Also, please provide closing statements on all accounts closed in 2024.

- 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