

2023 filing for Calendar Year 2024 Discount**CITY OF BEDFORD
Application for Water / Sewer Discount****APPLICATION DEADLINE 09/29/2023**

| | | | |
|------------------------------------|------------------|---------------------------------|---------------------|
| Name of Applicant | | Name of Spouse | |
| Address | City BEDFORD | Zip 44146 | Phone Number () |
| Social Security Number - Applicant | | Social Security Number - Spouse | |
| Birth Date - Applicant | Age of Applicant | Birth Date - Spouse | Age of Spouse |

Are you delinquent on your City of Bedford municipal income taxes or water/sewer Bill? YES NO

If you answered yes, you do not qualify for the 2024 water discount at this time. Please see the highlighted section on the back of this application or refer to Ordinance No. 060-23 for more information. If you answered no, continue with section A, B, C & D for approval.

TOTAL 2022 SOCIAL SECURITY AND / OR RAILROAD RETIREMENT INCOME: ATTACH PROOF

- A. \$ _____ Total year's Social Security and / or Railroad Retirement benefits of applicant in 2022.
(Bank statement can be used in lieu of Social Security Statement)
- B. \$ _____ Total year's Social Security and / or Railroad Retirement benefits for spouse in 2022.
- C. \$ _____ Adjusted gross income of ALL other household members over the age of 18 in 2022.
- ALL OTHER 2022 INCOME; TAXABLE & NON - TAXABLE: ATTACH PROOF**
- D. \$ _____ Adjusted Gross Income of applicant & spouse as reported on 2022 Federal Income Tax Return. Or if you do not file income tax, include wages, interest, pensions, unemployment compensation, rents, etc for 2022. Do not include benefits paid by the Veterans Administration or a branch of the Armed Services. Disability applicants deduct up to \$5,200 on the employer's portion of disability pension and should not include Workers Compensation, Veterans or Welfare Benefits.

Interest/Dividend household income cannot exceed \$3,000.00 per year.

\$ TOTAL HOUSEHOLD GROSS (Add A, B, C and D): **NOT TO EXCEED \$ 36,804** (Reference ORD 060-23) Provide proof: Copies of annual Social Security statements, Federal Income Tax Return, bank statements, and rents etc., must accompany this application.

PLEASE READ THE FOLLOWING STATEMENT AND SIGN BELOW.

I authorize the Finance Director to examine any financial records that relate to my income. Willfully falsifying information revokes the right to a reduction for 3 years. I declare under penalty of perjury that I have examined this return, and to the best of my knowledge and belief, this return is true and complete.

Signature of Applicant _____ Date _____

FOR DISABLED APPLICANTS UNDER AGE 65 ONLY - DOCTOR'S CERTIFICATE OF DISABILITY

"Permanently and totally disabled means a person who has, on the first day of January of the year of application for water/sewer discount some impairment in body or mind that makes one unfit to work at any substantially remunerative employment which the person is reasonably able to perform and which will, with reasonable probability, continue for an indefinite period of at least twelve months without any present indication of recovery therefrom or has been certified as permanently and totally disabled by a state or federal agency having the function of so classifying persons." (O.R.C. 323.151). Please attach proof (Social Security or State Pension award of disability certification letter).

I (we) hereby certify that _____ was, as of January 1, 2022 and is now totally and permanently disabled by virtue of physical disability or mental disability

| | | |
|--------------------------------------|-------------------------------|------------------------------|
| Physician / Psychologist (signature) | Date | Print Name of Person Signing |
| License No. _____ | Address - Street - City - Zip | Phone Number |

DISABILITY APPLICANT: APPROVAL CONTINGENT UPON DOCTOR'S COMPLETION OF THIS PORTION.

City of Bedford Water / Sewer Discount

2024

To Qualify

- Age 65 any time during calendar year or 100% totally and permanently disabled. (DOCTORS CERTIFICATE OF DISABILITY REQUIRED)
- Own and occupy your home (having name on the deed or a Life Estate) at the time of filing. Residents residing in rental property do not qualify for this discount.
- Have a combined income for applicant, spouse and ALL household members 18 years and older that is \$36,804 or less.
- A surviving spouse age 59-64 of a qualifying water / sewer discount recipient may retain the discount benefits if the income guidelines allow.

TO APPLY

Applications for water/sewer discount are accepted in the Income Tax Department. If you are eligible, you will receive a reduction on your 2024 water/sewer bill.

What is included as income?

Your combined household income cannot exceed \$36,804. Income of both applicant, spouse and ALL household members 18 years and older must be included. If you file an income tax return, include your adjusted gross income from your 1040 form plus your combined Social Security income.

Total Income includes household income (any person living in the home 18 years and older.)

Interest/Dividend household income cannot exceed \$3,000.00 per year.

All applicants must provide documentation of all sources of income. The following are examples of sources of income.:

- Social Security
- Pension
- Dividends
- IRA Withdrawals
- Interest
- Wages
- Alimony
- Annuities
- Rental Income
- Gambling Winnings
- Insurance Contracts
- Unemployment compensation
- Gain from property sale (other than primary residence)

NOTICE!

Applicant and/or their spouse **must not be delinquent on municipal income taxes owed to the City of Bedford** and further must not be behind or delinquent more than three months on their City of Bedford water/sewer bill in order to keep their eligibility for the water/sewer discount. Accordingly, once the delinquency is paid in full by the applicant and their spouse, the discount will be reinstated (not retroactively). (Reference ORD 9900-21)

Questions????

Please call our office, we will be glad to help you.
440.735.6505

Is the discount retroactive? NO

Do I need to apply for the Water/Sewer discount every year? YES

All applicants must apply for discounts for 2024. The application needs to be filed by the last Friday in September of 2023. *Income is based on the year 2022

Do I include my Social Security Income before or after Medicare is deducted?

Include Social Security after Medicare is taken out. Change amounts when a spouse's Social Security income is added. Railroad Retirement income is treated the same as Social Security.

***DISCOUNT IS CALCULATED USING 2022 INCOME TAX DOCUMENTS**