



4. **If this is your first senior application** for this property because you have recently purchased the property, please answer:  *check if not applicable*  
 Did you have limited-income senior exemption on your previous NY property?  Yes  No  
 IF YES, provide the address and municipality: \_\_\_\_\_
5. For the purpose of this exemption, New York State Laws require that your IRA investments are treated the same as a savings account; that is, any amount withdrawn from the account(s) will be ignored but the earnings are considered income, even when you do not take any distribution. "Earnings" may be in the form of interest, dividends or capital gains. Documentation of earnings is required.

Do you or your spouse **have ANY** Individual Retirement Accounts (IRA)?

Yes (please complete the following)  No (skip to the Certification below)

Indicate which types or IRA investments you have (including rollovers). Check all that apply and list them below (attach additional sheet(s) if necessary).

Traditional  Roth  Check here if invested in an annuity

**IRA DISCLOSURE STATEMENT\***

Name of Financial Institution:	Account Number	Account Type	Name on Account	Earnings for 20__
				\$
				\$
				\$
				\$
				\$
				\$

**\*Please note: you must list all IRA investments even if you are not currently taking distributions.**

Certification:

**UNDER PENALTY OF PERJURY**, I/we swear that I/we have listed every **Individual Retirement Account** and have included the earnings statements for all IRA investments. **I have disclosed all other information** including, but not limited to, non- taxable interest income, capital gains, alimony, business and/or commissions, rental income, insurance disability income, veteran's disability income, workers' compensation, unemployment payments, etc.

And, **UNDER PENALTY OF PERJURY**, I/we swear that the residence indicated on the front of this form is my/our **Primary Residence**.

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

Signature: \_\_\_\_\_

Date: \_\_\_\_\_

**Failure to return this completed addendum will result in denial of exemption.**