



COMPASSIONATE APPEAL – FINANCIAL DISCLOSURE FORM

(Appeal due to Extreme Poverty or Sickness under Section 357. (1) (d.1) of the Municipal Act)

- The purpose of this Financial Disclosure Form is to provide the City of Windsor with financial information which will be used in strict confidence to make a judgment on the appeal application for tax relief due to extreme sickness or poverty under Section 357. (1) (d.1) of the Ontario Municipal Act.
- To be eligible for tax relief (cancellation, reduction or refund of taxes), you must satisfy the conditions described in Category 1, 3 and 4 or all four Categories (Category 2 is not valid without satisfying Category 1, 3 and 4).

ELIGIBILITY (PLEASE CHECK THE APPROPRIATE BOX WITHIN EACH CATEGORY TO CONFIRM ELIGIBILITY)

Category 1- Extreme Poverty

A single residential property owner will be eligible for tax relief if:

Family income less than low income thresholds:

- | | | |
|--------------------------|-------------------|--------------|
| <input type="checkbox"/> | 1 Persons | \$ 26,620.00 |
| <input type="checkbox"/> | 2 Persons | \$ 33,140.00 |
| <input type="checkbox"/> | 3 Persons | \$ 40,742.00 |
| <input type="checkbox"/> | 4 Persons | \$ 49,466.00 |
| <input type="checkbox"/> | 5 Persons | \$ 56,104.00 |
| <input type="checkbox"/> | 6 Persons | \$ 63,276.00 |
| <input type="checkbox"/> | 7 Or More Persons | \$ 70,448.00 |

Category 3 - Financial Savings/Assets

A single residential property owner will be eligible for tax relief if:

Financial savings/assets of the family unit as at December 31st, 2023 of the tax year are:

- Equal to or below the property taxes.
- Above the property taxes. However, the financial savings/assets are not more than two times the property taxes.

Category 2 - Sickness

A single residential property owner will be eligible for tax relief if:

- Prolonged sickness for at least 90 consecutive days, in 2023, for the primary income earner.
 - Prolonged sickness for at least 90 consecutive days, in 2023, for a family member that requires the primary income earner to take a leave from work.
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- Provide a completed **Compassionate Appeal – Attending Physician’s Form** (Please note that this element of the application is strictly optional).

Category 4 - Current Value Assessment (CVA) of the Property

A single residential property owner will be eligible for tax relief if:

- Property assessment value is equal to or less than \$168,000
- Property assessment value is above \$168,000. However, the property assessment value which falls above the cut-off level is below the property taxes.

The following documents will be required to accompany this application when they become available. (Please mail or drop them off at the address provided on the 2023 Tax Adjustment Application Form):

- A copy of the **2023 Income Tax Return from Canada Revenue Agency**
 - Copies must be provided for **all** current/listed owners on the property together with the spouse/partner of the property owner and any occupants 18 years of age or older. Children below the age of 18 in full time attendance at a qualifying educational institution are excluded (must provide proof of enrollment if 16-18 years of age).
- A copy of the **2023 Notice of Personal Income Tax Assessment from Canada Revenue Agency**
 - Copies must be provided for **all** current/listed owners on the property together with the spouse/partner of the property owner and any occupants 18 years of age or older. Children below the age of 18 in full time attendance at a qualifying educational institution are excluded (must provide proof of enrollment if 16-18 years of age). **(To request a copy 1-800-959-8281).**
- A copy of an official **Bank Statement**, outlining all transactions for the period ending December 31st, 2023, for all bank accounts owned. Please note that additional banking information may be required.
 - Copies must be provided for **all** current/listed owners on the property together with the spouse/partner of the property owner (this includes any account whether you have it by yourself or with someone else or whether it is in your name or any other name).
- In addition, other supporting documentation may be requested if more information is required with respect to your application.

Please note that the applicant must submit the Tax Relief Application on or before February 29, 2024. The applicant has three months after the application deadline to provide all other required supporting documentation. Deadline for supporting documentation is May 31, 2024.

For complete information about eligibility and application requirements call the City of Windsor at: 311, or (519) 255-CITY (2489).

PERSONAL INFORMATION					
Occupation:		Employer:		Employer phone number: ()	
Marital status (please check one box): <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Separated <input type="checkbox"/> Widowed <input type="checkbox"/> Common Law					
If married, give particulars of wife/husband as follows:					
Spouse's last name:		First:	Middle:		
Occupation:		Employer:		Employer phone number: ()	
Other family members (children, dependents; that reside in the household the application is being made for):					
Name:		Age:	Occupation:	Income:	Dependent:
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
					<input type="checkbox"/> Yes <input type="checkbox"/> No
FINANCIAL INFORMATION					
What is the approximate <u>total family income</u> for your household?					
Yearly: \$		Did you apply for the Ontario Energy & Property Tax Credit (OEPTC) on your 2023 Income Tax Return? <input type="checkbox"/> Yes <input type="checkbox"/> No			
What type of income do you receive: (Please select all appropriate responses that apply)					
<input type="checkbox"/> Employment		<input type="checkbox"/> Unemployment Compensation		<input type="checkbox"/> Worker's Compensation	
<input type="checkbox"/> Old Age Pension		<input type="checkbox"/> Retirement Benefits		<input type="checkbox"/> Child Tax Credit	
		<input type="checkbox"/> Accident/Disability Benefits		<input type="checkbox"/> Social Security	
		<input type="checkbox"/> Rental		<input type="checkbox"/> Child Support	
				<input type="checkbox"/> Other	
If you selected other, please provide the source and the amount of income below:					
Do you have a chequing or savings account <input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, please provide the following information:					
Name and Address of Bank, Credit Union or Financial Institution:			Type of account:		Account Number:
Please provide the full value of all savings/chequing accounts listed above as at December 31 st , 2023:					
\$					
Do you have any stocks, bonds, securities, certificates of deposit, mutual funds, money market account (excluding RRSP's), etc?: <input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, please provide the full value of all investments as at December 31 st , 2023, for all applicable categories mentioned above:					
\$					
Do you own any additional homes, buildings, land or any other real estate (excluding your primary residence): <input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, please provide details:					
Do you own or operate a business? <input type="checkbox"/> Yes <input type="checkbox"/> No					
If yes, what is the name and location?					

The information on this form is collected under the authority of section 357 (1) (d.1) of the Municipal Act 2001 and will only be used for the purposes of determining eligibility for property tax relief and the amount of tax relief in respect of the Tax Relief Application. Questions about this collection may be made to the Manager, Property Valuation & Administration, Room 410, 350 City Hall Square West, Windsor Ontario; 519-255-6100 Ext. 6170.