



DAVID COLE
DEPUTY ASSESSOR

DEPARTMENT OF FINANCE
DIVISION OF ASSESSMENT
869 PARK AVE
CRANSTON, RI 02910

2024 TAX FREEZE APPLICATION CHECK LIST

Any of the documents listed below should be included with your application, if you or anyone in the household receives them.

- ALL DOCUMENTS MUST BE SUMMARIES FOR THE YEAR **2023**.
- Documents must be provided for **EVERY PERSON** living in the household.
- Income from any occupant who became deceased in 2023 must be provided.
- DEADLINE TO RECEIVE APPLICATIONS *IN OFFICE* IS **MARCH 15TH**.
- **LATE APPLICATIONS WILL NOT BE ACCEPTED FOR ANY REASON. NO EXCEPTIONS.**

☐ Your application, *completed **IN FULL***

AND ANY OF THE FOLLOWING THAT ARE APPLICABLE TO YOU OR ANY/ALL OCCUPANTS:

- ☐ SSA 1099 (see sample on back of this list) – it should read “**2023**” and have a **pink box**).
AND/OR
- ☐ *Supplemental Income*: an SSI summary statement from Social Security is required if you do not receive a 1099 (see sample 1099 for help with this).
AND/OR
- ☐ W2 from any/all employers if you are currently working or worked at all in 2023.
AND/OR
- ☐ Investment account interest. *If you have any accounts where funds are reinvested, please provide proof of redistribution or received funds will be counted as income received.
AND/OR
- ☐ Any 1040s you may receive.
AND/OR
- ☐ Any rent receipts. If you own any rentable property and do not provide receipts or the rentable space is reported as vacant, economic rent will be applied.
AND/OR
- ☐ Any retirement interest.
AND/OR
- ☐ Any funeral fund interest.
AND/OR
- ☐ Any miscellaneous income not listed above but that would be considered reportable on taxes, regardless of if you file an income tax return, such as unemployment or TDI, etc.
- ☐ *If any individual occupants do not receive income, *a signed and notarized affidavit is required in lieu of income documentation, per occupant*. The senior center can assist with this.
- ☐ *DO NOT INCLUDE: what you *will be receiving* from Social Security for 2024.

- If you need to request a **1099**, please contact Social Security at 1.800.772.1213 and follow the automated prompts.
- For an **SSI summary**, please call the same number and speak to a representative.
- Additional assistance is provided through the Cranston Senior Center if needed 401.780.6254.
- You may also call the Assessor's office with any questions 401.780.3181.

FORM SSA-1099 – SOCIAL SECURITY BENEFIT STATEMENT

2023 • PART OF YOUR SOCIAL SECURITY BENEFITS SHOWN IN BOX 5 MAY BE TAXABLE INCOME. • SEE THE REVERSE FOR MORE INFORMATION.		
Box 1. Name JOHN J SMITH		Box 2. Beneficiary's Social Security Number XXX-XX-XXXX
Box 3. Benefits Paid in 2019 1,234.00	Box 4. Benefits Repaid to SSA in 2019 NONE	Box 5. Net Benefits for 2019 (Box 3 minus Box 4) 1,234.00
DESCRIPTION OF AMOUNT IN BOX 3 Paid by check or Direct deposit 1,234.00 Benefits for 2023 1,234.00		DESCRIPTION OF AMOUNT IN BOX 4 NONE
		Box 6. Voluntary Federal Income Tax Withheld NONE
		Box 7. Address JOHN J SMITH 123 AVENUE DRIVE CRANSTON, RI 02920
		Box 8. Claim Number (Use this number if you need to contact SSA.) XXX-XX-XXXXA