

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

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**Hours:** M-F 8AM - 5PM  
**Address:** 2001 S State St., #N1-200  
 Salt Lake City Utah 84190

**2026 SENIOR DEFERRAL APPLICATION**

**NOTE:** A new application must be filed each year.  
 The deadline to apply is September 1, 2026



TREASURER

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, 2027.

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

- I owned and occupied the residence described above on January 1, 2026 as my primary residence.
- The assessed value of my property is no greater than the Salt Lake County median property value of \$538,500 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 \$88,442.00 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, 2026**

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

**5. 2025 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 2025 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 2025 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
- I rent out \_\_\_\_\_% of my home and/or use \_\_\_\_\_% of my home in a trade or business \_\_\_\_\_/year
- Other income \_\_\_\_\_/year
- Income from other members of household not included above \_\_\_\_\_/year
- **Total 2025 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).

**6.2025 HOUSEHOLD ASSETS** (all applicants)

Attach copies of all household asset statements which must reflect Dec 31, 2025 balances. Also, please provide closing statements on all accounts closed in 2025.

- Checking accounts, Direct Express Debit accounts, Venmo history for regular payments \_\_\_\_\_
- 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 \_\_\_\_\_
- Do you own any other real estate or rental property? If so, please provide 2025 tax notice \_\_\_\_\_

**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 | 2001 S State Street #N1-200 | SLC, UT 84190-0001**