

SUBJECT: Acceptance of late filed and retroactive Senior Citizen and Disabled Veteran exemption applications.

AGENDA OF: August 6, 2019

ASSEMBLY ACTION:

Adopted without objection
8-6-19
JSM

MANAGER RECOMMENDATION: Present to the Assembly for consideration.

APPROVED BY JOHN MOOSEY, BOROUGH MANAGER:

Route to:	Department/Individual	Initials	Remarks
1	Originator	BL	
2	Finance Director		
3	Borough Attorney	John N.S.	
4	Borough Clerk	JSM	7/29/19

ATTACHMENTS: Fiscal Note: Yes ☒ No
Senior Citizen and Disabled Veteran Tax Exemptions.

SUMMARY STATEMENT: Attached is a listing of individuals who are requesting exceptions for late filed and retroactive applications for Senior Citizen and Disabled Veteran exemption. In 2002, the State of Alaska enacted legislation whereby Disabled Veterans and Senior Citizens may request retroactive exemption. MSB Code was amended accordingly. MSB Code 3.15.030(c) now establishes authority for the assembly with good cause to accept the late filed applications as timely.

RECOMMENDATION OF ADMINISTRATION: Acceptance of late filed and retroactive requests for tax exemption.

MATANUSKA-SUSITNA BOROUGH
FISCAL NOTE

Agenda Date: August 6, 2019

SUBJECT: Acceptance of retroactive and late filed Senior Citizen and Disabled Veteran exemption applications.

ORIGINATOR: Brad Pickett, Borough Assessor

FISCAL ACTION (TO BE COMPLETED BY FINANCE)	FISCAL IMPACT <u>YES</u> NO
AMOUNT REQUESTED <u>\$292,233</u>	FUNDING SOURCE <u>ARA, NAR, FSA, RSA</u>
FROM ACCOUNT # <u>100.2XX.000 311.100/102</u>	PROJECT #
TO ACCOUNT :	PROJECT #
VERIFIED BY: <u>[Signature]</u>	CERTIFIED BY:
DATE: <u>7/24/19</u>	DATE:

EXPENDITURES/REVENUES: (Thousands of Dollars)

OPERATING	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Personnel Services						
Travel						
Contractual						
Supplies						
Equipment						
Land/Structures						
Grants, Claims						
Miscellaneous						
TOTAL OPERATING						

CAPITAL	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
---------	--------	--------	--------	--------	--------	--------

REVENUE	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
---------	--------	--------	--------	--------	--------	--------

FUNDING: (Thousands of Dollars)

General Fund	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
State/Federal Funds						
Other						
TOTAL (NAR/FSA/RSA)						

POSITIONS:

Full-Time	FY2016	FY2017	FY2018	FY2019	FY2020	FY2021
Part-Time						
Temporary						

ANALYSIS: (Attach a separate page if necessary)

PREPARED BY: _____ PHONE: _____
 DEPARTMENT: _____ DATE: _____
 APPROVED BY: [Signature] DATE: 7/24/19

Senior Citizen and Disabled Veteran Tax Exemptions

Account #	Name	Exemption	Tax Year	Amount
51107B02L007	Jose Capo	DVET	2017	\$201,600
51107B02L007	Jose Capo	DVET	2018	\$214,600
57174B21L016	Teddy Fortenberry II	DVET	2018	\$218,000
55751B03L006	Robert Keith	DVET	2019	\$218,000
53993B03L013	Kris Lake	DVET	2019	\$218,000
57117B01L006	Rebecca Manson	DVET	2019	\$218,000
51069B13L023	Christina McCann	DVET	2017	\$82,400
51069B13L023	Christina McCann	DVET	2018	\$82,500
51220B03L022	Kevin McCasland	DVET	2017	\$193,900
51220B03L022	Kevin McCasland	DVET	2018	\$196,900
51102B02L006	Guy McBroom	DVET	2019	\$196,450
56448B03L003	Alexandria Nunez	DVET	2019	\$218,000
56534B02L004	Ben Prouty	DVET	2019	\$84,000
56820B02L001	John Watson	DVET	2019	\$218,000
52029B02L005	Kevin Wellington	DVET	2019	\$218,000
51596B02L003	Brian Young	DVET	2019	\$218,000
56419B05L014	Cynthia Armendariz	DVET	2019	\$218,000
54649B01L025A	Marc Wilson	DVET	2019	\$218,000
56983B12L042	Alan Mariner	DVET	2019	\$218,000
51929000L029-A	Troy Crow Jr	DVET	2018	\$218,000
51929000L029-A	Troy Crow Jr	DVET	2019	\$218,000
51537B02L004	Timothy Brady	DVET	2019	\$209,400
52846B05L004	Roy Barnett	DVET	2018	\$21,000
52846B05L004	Roy Barnett	DVET	2019	\$21,000
215N04W02B001	Lenus Land	DVET	2018	\$218,000
215N04W02B001	Lenus Land	DVET	2019	\$218,000
52892B01L020	Albert Mouton Sr.	DVET	2018	\$218,000
52892B01L020	Albert Mouton Sr.	DVET	2019	\$218,000
57395B04L004	Sandy Marie York	DVET	2019	\$218,000
217N01W28D007	David Shook	DVET	2019	\$218,000
52565B02L001	Jerry Baker	SCIT	2017	\$136,600
52565B02L001	Jerry Baker	SCIT	2018	\$138,500
53168000T00A	Martin Woods	SCIT	2018	\$53,720
53168000T00A	Matrin Woods	SCIT	2019	\$52,120
53168000T00B	Martin Woods	SCIT	2018	\$15,500
53168000T00B	Martin Woods	SCIT	2019	\$15,500
56170000L008	Marvin Ungerecht	SCIT	2019	\$80,450
56170000L007	Marvin Ungerecht	SCIT	2019	\$61,300

Senior Citizen and Disabled Veteran Tax Exemptions

Account #	Name	Exemption	Tax Year	Amount
57435000L001	Michael McLain	SCIT	2018	\$218,000
57435000L001	Michael McLain	SCIT	2019	\$218,000
51220B03L016	Greg Miller	SCIT	2019	\$218,000
52769B07L008	Lucinda Radliff	SCIT	2018	\$92,850
52769B07L008	Lucinda Radliff	SCIT	2019	\$97,200
56753B01L006B	Jane Petersen	SCIT	2019	\$178,600
51247B04L007A	Kenneth Seipel	SCIT	2017	\$201,100
51247B04L007A	Kenneth Seipel	SCIT	2018	\$200,400
55121B02L009	Theresa Smith	SCIT	2018	\$218,000
56075B03L011	Roy Smyth	SCIT	2017	\$46,200
56075B03L011	Roy Smyth	SCIT	2018	\$44,900
4U03488000L20	Daniel Thomas	SCIT	2018	\$40,500
4U03488000L20	Daniel Thomas	SCIT	2019	\$40,500
56192000L001	John Thorn	SCIT	2018	\$66,300
56192000L001	John Thorn	SCIT	2019	\$66,300
55718B03L010	Paulette Waddell	SCIT	2019	\$218,000
56612B25L016	Phillip Ward	SCIT	2017	\$213,100
56612B25L016	Phillip Ward	SCIT	2018	\$217,100
56429B02L006	Christine Peake	SCIT	2018	\$130,800
53016B07L002	William Forrester	SCIT	2018	\$16,000
53016B07L002	William Forrester	SCIT	2019	\$16,000
53016B07L004	William Forrester	SCIT	2018	\$3,100
53016B07L004	William Forrester	SCIT	2019	\$5,100
55548B01L005	Mary Martin	SCIT	2017	\$218,000
55548B01L005	Mary Martin	SCIT	2018	\$218,000
217N02W08C012	Patrick McAlpin	SCIT	2019	\$218,000
52045B01L013	Paul Miebs	SCIT	2019	\$28,800
54127B01L010	Melissa Nagl	SCIT	2019	\$218,000
56823B01L010	Wayne Simmons	SCIT	2019	\$218,000
119N03E26A006	William Christensen	SCIT	2018	\$110,000
52895B01L006A	3101 Land Trust	SCIT	2019	\$202,600
56039000L001-A	John Sligh	SCIT	2019	\$218,000
118N02E16B003	Edmund Houtte	SCIT	2018	\$91,257
118N02E16B003	Edmund Houtte	SCIT	2019	\$91,257
117N02E01B003	River Bean	SCIT	2019	\$89,880

Senior Citizen and Disabled Veteran Tax Exemptions

Account #	Name	Exemption	Tax Year	Amount
53768B02L005	James Jewett	SCIT	2019	\$102,000
117N02E26D056	Olivia Kochendorfer	SCIT	2018	\$99,100
52468B01L025	Edna Lewis	SCIT	2017	\$204,500
52468B01L025	Edna Lewis	SCIT	2018	\$204,800
57815000P001A	Lory Jimenez-Betts	SCIT	2019	\$218,000
52004B02L001	Lance Cameron	SCIT	2019	\$184,000
53542B02L015A	Dawn Caswell	SCIT	2019	\$178,000
56323000L006	Robert Huppert	SCIT	2019	\$218,000
54812B01L006A	John Nickels II	SCIT	2019	\$218,000
56612B08L013	Jack Nims	SCIT	2019	\$218,000
56612B22L003	Wendy Ramstad	SCIT	2019	\$208,600
217N01W02C027	Ismenia Smith	SCIT	2019	\$218,000
51589000L005C	Arlene Stephi	SCIT	2019	\$191,600
56282B01L010	Cynthia Traylor	SCIT	2018	\$97,900
56282B01L010	Cynthia Traylor	SCIT	2019	\$97,100
51188B01L001	Dale Truner	SCIT	2019	\$130,000
56598B04L003	Michael Conner	SCIT	2019	\$218,000
55805B04L002	Gloria Dufford	SCIT	2018	\$158,000
55805B04L002	Gloria Dufford	SCIT	2019	\$161,700
57159000L002	Richard Gaffey	SCIT	2018	\$218,000
55011B07L011	Regina Gates	SCIT	2018	\$174,000
51313B06L015	Mary Goldsby	SCIT	2019	\$218,000
57488000T00D	Deborah Bean	SCIT	2018	\$218,000
57488000T00D	Deborah Bean	SCIT	2019	\$218,000
219N04W08D022	Marlys Bryan	SCIT	2019	\$205,200
59129000U017	Curtis Toms	SCIT	2017	\$218,000
59129000U017	Curtis Toms	SCIT	2018	\$218,000
51998B04L011	Shirley Lancaster	SCIT	2019	\$53,800
52938B04L007	Katherine Nelson	SCIT	2019	\$203,500
52477B03L014	Frederick Rostorfer	SCIT	2018	\$218,000
52477B03L014	Frederick Rostorfer	SCIT	2019	\$218,000
54499000L008A	Gregory Branch	SCIT	2019	\$218,000
53189B02L009	Jack Smiley	SCIT	2018	\$218,000
53189B02L009	Jack Smiley	SCIT	2019	\$218,000
52528B02L001	Pamela Potter	SCIT	2018	\$172,300
52528B02L001	Pamela Potter	SCIT	2019	\$174,500