

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

AGENDA OF: January 7, 2020

ASSEMBLY ACTION:

Approved under the consent Agenda. 1/7/20 KBJ

MANAGER RECOMMENDATION: Present to the Assembly for consideration.

APPROVED BY JOHN MOOSEY, BOROUGH MANAGER: 

Route to:	Department/Individual	Initials	Remarks
1	Originator	BP	
2	Finance Director	CK	
3	Borough Attorney	NS	
4	Borough Clerk	Sam	12/29/19 KBJ

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: January 7, 2020

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>\$76,274</u>	FUNDING SOURCE <u>ARA/NAR/FSA/RSA/SSA</u>
FROM ACCOUNT # <u>100.2xx.000.311.100/102</u>	PROJECT #
TO ACCOUNT :	PROJECT #
VERIFIED BY: <u>[Signature]</u>	CERTIFIED BY:
DATE: <u>12/23/19</u>	DATE:

EXPENDITURES/REVENUES: (Thousands of Dollars)

OPERATING	FY2017	FY2018	FY2019	FY2020	FY2021	FY2022
Personnel Services						
Travel						
Contractual						
Supplies						
Equipment						
Land/Structures						
Grants, Claims						
Miscellaneous						
TOTAL OPERATING						

CAPITAL						
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REVENUE				<u><76.3></u>		
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FUNDING: (Thousands of Dollars)

General Fund				<u><47.6></u>		
State/Federal Funds						
Other <u>(NAR/FSA/RSA/SSA)</u>				<u><28.7></u>		
TOTAL				<u>76.3</u>		

POSITIONS:

Full-Time						
Part-Time						
Temporary						

ANALYSIS: (Attach a separate page if necessary)

PREPARED BY: _____ PHONE: _____
 DEPARTMENT: Chapman & Herold DATE: _____
 APPROVED BY: _____ DATE: 12/23/19

Senior Citizen and Disabled Veteran Tax Exemptions

Account #	Name	Exemption	Tax Year	Amount
52568B01L006	Thomas Dicus	DVET	2018	\$209,300
52568B01L006	Thomas Dicus	DVET	2019	\$218,000
52912B07L009	Thomas Lloyd	DVET	2018	\$135,400
52912B07L009	Thomas Lloyd	DVET	2019	\$135,800
54740B03L009	Tulla Wright	DVET	2019	\$218,000
51590B04L005	Dennis Timm	DVET	2019	\$118,300
57335B01L007	Robert Moxham	DVET	2019	\$218,000
56001B01L017	Denise Durman	SCIT	2018	\$47,000
56001B01L017	Denise Durman	SCIT	2019	\$46,300
56001B01L016	Denise Durman	SCIT	2018	\$35,000
56001B01L016	Denise Durman	SCIT	2019	\$35,000
51113B05L024	Donald Gerber	SCIT	2019	\$133,700
51113B05L025	Donald Gerber	SCIT	2019	\$40,000
52894B01L005	Harley Larson	SCIT	2019	\$157,400
55505000L010	Gregory Quinton	SCIT	2019	\$190,900
51124000T00A	Kathy Sleen	SCIT	2019	\$218,000
51069B03L016	Shirley Townsend	SCIT	2019	\$34,400
52934B04L008	Susan Vann	SCIT	2019	\$65,520
52934B04L003	Susan Vann	SCIT	2019	\$14,000
59998007U0035B	Wade Wariner	SCIT	2018	\$8,900
59998007U0035B	Wade Wariner	SCIT	2019	\$8,900
54163B02L060A	Daniel Hansen	SCIT	2018	\$128,200
54163B02L060A	Daniel Hansen	SCIT	2019	\$128,200
56565000L009	John Matich	SCIT	2018	\$108,700
56565000L009	John Matich	SCIT	2019	\$108,700
59999000U182	Marlin Bostwick	SCIT	2019	\$51,100
56070000L0662	Ronald McKay	SCIT	2018	\$15,900
52313B01L007	Clement Lakey	SCIT	2019	\$180,200
51863B01L009	Clarence Schroeder	SCIT	2019	\$54,300
52993B05L016	Carolyn Ryan	SCIT	2019	\$218,000
51060B02L004	Patricia Wilson	SCIT	2018	\$108,800
51060B02L004	Patricia Wilson	SCIT	2019	\$109,150
56443B03L011	Thomas Hopkins	SCIT	2018	\$162,100
56443B03L011	Thomas Hopkins	SCIT	2019	\$166,500

Senior Citizen and Disabled Veteran Tax Exemptions

Account #	Name	Exemption	Tax Year	Amount
51238B01L023	Fagnani Henry A	SCIT	2018	\$218,000
51238B01L023	Fagnani Henry A	SCIT	2019	\$218,000
51187B03L010	Richard Antonio	SCIT	2019	\$91,400
52045B01L002	Delaney Brewer	SCIT	2018	\$19,900
52045B01L002	Delaney Brewer	SCIT	2018	\$20,500
56612B18L017	Sally Neumann	SCIT	2019	\$194,400