

Ridgefield Senior Tax Committee
March 6, 2025-- 4:30 pm

Town Hall – Large Conference Room

Minutes

Location: Town Hall Building Ridgefield CT—Large Conference Room

Members Present:

- Leonard Comberiate - Secretary
- Andrew Okrongly (via Zoom)
- Joseph Adams, Jr
- Gary Roman - Chair
- Linda Massie – Vice Chair
- Carl Forcheski
- James Bertoluzzi

The fourth meeting was called to order by Chair, Gary Roman, and commenced at 4:35 pm, at which time a motion was made duly seconded. No edits to the minutes of the prior meeting were raised.

Public Comment Period:

The Committee received an email from Joseph Ternullo, Commissioner of the Ridgefield Commission on Aging dated March 6, 2025, expressing concern about a number of issues pertaining to the current Ridgefield Senior Tax Credit (RSTC). Mr. Ternullo appeared before the Committee to verbally discuss a number of issues contained within his email. His comments included lack of clarity in the legal public notice dated January 16, 2025, from Al Garzi, Town Assessor, preventing eligible residents from applying for the RSTC. Another issue was that residents did not get to the assessor's office during the limited January 1 to April 1 application window. He further questioned whether an annual financial adjustment in the senior tax credit can be implemented similar to Social Security and whether automatic enrollment into the senior tax credit could be implemented. He further raised a number of issues not within the mandate of the Ridgefield Senior Tax Committee. The Committee thanked Mr. Ternullo for both his email and attendance at the Committee's meeting,

The Committee again welcomed Anthony Phillips, Director of Ridgefield Social Services (RSS). Mr. Phillips presented additional information requested by the Committee at their last meeting. He indicated that his agency identified 151 senior families age 65 or older and that 38 of the 151 senior citizens owned their home and had an annual income of approximately \$28,000. Assistance provided by RSS included energy assistance, Medicaid, SNAP, rent, utilities and mortgage assistance.

Based on a review of eligibility to be assisted by RSS, it was determined that the threshold was \$59,507, which is 60% of the CT median income level for a two-person family. A review of the CT median income is as follows:

Family size--- 100% State median income--- 60% state median income.

1	\$75,843	\$45,505
2	\$99,180	\$59,507
3	\$122,516	\$73,509

The Committee thanked Mr. Phillips for his attendance and the additional information provided to the Committee.

Next reviewed and discussed by the committee was a table of Ridgefield Statistics requested from the Ridgefield assessor. Specifically, the total tax revenue was \$153,320,034, which included real estate taxes and motor vehicle taxes of \$10,145,910. The total Ridgefield assessments were \$5,867,744,961.

A summary of the tax credit programs included:

- Senior tax credit -no income verification--\$1,982,516 provided to 1,892 households.
- Tax Deferral program--\$1,803,679 provided to 30 households.
- State based homeowners' program (State mandated; funded by Ridgefield) - \$38,625 provided to 65 households.
- State based renters rebate program (State mandated; funded by Ridgefield) - \$31,525 provided to 75 households.

- State mandated Veterans 100% disability (2025 – 100% of residential assessments waived) \$5,062,682 cost to Ridgefield \$138,671

Total Town of Ridgefield Tax Credit programs from above--\$2,052,966, which is about 1.3% of the total tax revenue.

Senior Spectacular Expo – Commission on Aging:

Chairman Roman next discussed the participation of the Senior Tax Committee during the 2025 Senior Spectacular EXPO to be held April 26, 2025, at the Town Recreation Center. The STC discussed the preparation of talking points to express awareness of the Committee with respect to the Senior Tax Credit and learn critical issues impacting Seniors.

A review of a sample survey was distributed to the committee members for their review, drafted by the Social Services Director. Issues were raised about the information that was to be collected, including annual income, which might not be appropriate. James Bertoluzzi was tasked with reviewing the draft survey and providing an alternative survey if deemed appropriate.

Town Senior Tax Surveys:

The Committee next reviewed a worksheet of the neighboring towns including Wilton, Westport, Weston, Redding, Bethel, Newtown and New Canaan. The file includes the current population, median household income, people above age 65 at the poverty level, number of housing units owned and rented, and median value of owner-occupied homes.

The worksheet summarized the number of households receiving tax credits or deferments, or both. The worksheet detailed the criteria for receiving a- credit or a deferral, including age, residency requirements, income levels, asset limitations.

In an effort to finalize the table a number of assignments were made to verify the information:

- Wilton—Andrew Okrongly
- Westport-Gary Roman
- Weston- Gary Roman

- Bethel-Andrew Okrongly
- Newtown and Westport—Carl Forcheski

Chairman Roman asked the committee members to download and review the Wilton CT public policy describing the senior public policy as a potential template for drafting a similar policy for Ridgefield CT.

The next item discussed were items that require outside legal counsel including:

1. Review of CT statutes allowing for senior tax credits with and without income limits
2. Review of CT statutes on the ability to provide credit on auto taxes
3. Review of the CT mandated homeowners and CT based renters' programs
4. The Committee will consider engaging legal counsel to review the issues as recommended above, to guide the development of public policy for Ridgefield on senior tax credits. In addition, a second legal review, once the STC drafts language for the Town Regulation for senior tax credits may be warranted.

Given the last requirement of reporting back to the Board of Selectpersons in 60 days, Mr. Roman is drafting a report to be delivered to the Board of Selectpersons detailing the progress of the Committee. The report will be published during March 2025 and sent to Selectpersons.

No open topics were introduced by the Committee members.

Next Meetings

The next three meetings will be held on Thursday at 4:00 pm, as follows:

- March 20, 2025
- April 10, 2025
- April 24, 2025

There being no other business for the Committee, a motion was made and unanimously made to adjourn the meeting of the tax committee at 6:35 pm.

Submitted.

Leonard Comberiate

Secretary