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Do you know what tax
benefits are available to
California seniors?

Learn more at:
boe.ca.gov/seniors

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TAX HELP for
SENIORS

CALIFORNIA
STATE BOARD OF EQUALIZATION



CALIFORNIA STATE BOARD OF EQUALIZATION

GEORGE RUNNER

MEMBER, 1ST DISTRICT

George.Runner@boe.ca.gov

You deserve to enjoy the rewards of your life's work, but rising taxes and inflation can leave you feeling squeezed.

As a California senior, you should know about the tax benefits and services available to you. For example, you may qualify for property tax exemptions or be eligible for free income tax preparation.

The information in this brochure and online will help you access valuable tax help. If you need additional assistance, please call the phone number listed below.

500 Capitol Mall, Suite 1750
Sacramento, CA 95814
Telephone: 916-445-2181
Fax: 916-327-4003



TAX TIPS FOR CALIFORNIA SENIORS

- **Need a break?** If you are 62 or older, or disabled, you may be able to postpone property tax payments. To qualify, you must have at least 40 percent equity in your home and an annual household income of \$35,500 or less. Learn more at sco.ca.gov (search "seniors").
- **Moving?** If you are 55 or older and selling your home, you may be able to transfer the taxable value of your current property to your new property, saving hundreds or thousands of dollars each year.
- **Got kids?** If you sell or transfer property to your child or grandchild, they may be able to maintain the taxable value of the property.
- **Overtaxed?** If you pay a parcel tax or special assessment, you may be eligible for an exemption. To find out, check your bill for the contact information of the local district or agency that imposed the parcel tax or special assessment.
- **Need tax help?** You may be eligible for free income tax help from certified volunteers who can answer your questions about pensions and other retirement issues unique to seniors.
- **Buying meds?** If you buy your prescription medications from a registered pharmacist, in person or online, your purchases are not subject to tax.

Learn more at:
boe.ca.gov/seniors



Government should provide easily accessible information about tax programs and be available to answer questions. Please call or mail back the card below to request assistance or receive more information.

I would like more information about tax help for **seniors**.
 Income Tax Property Tax Sales & Use Tax

First Name

Last Name

Address

City/State/Zip

Daytime Telephone

Email

Cut this card on the dotted line, attach postage, and mail. *Privacy Statement:* Your contact information will not be shared unless required by law. It will only be used to periodically inform you of important policy issues.

