



SEN. GEORGE RUNNER (RET.)

MEMBER
STATE BOARD OF EQUALIZATION
CALIFORNIA'S TAX BOARD

July 27, 2016

Assemblymember Lorena Gonzalez, Chair
Assembly Appropriations Committee
State Capitol, Room 2114
Sacramento, CA 95814

RE: SB 909 (BEALL) – PROPERTY TAX POSTPONEMENT: SPECIAL NEEDS TRUST CLAIMANTS ▪ SUPPORT ▪

Dear Assemblymember Gonzalez:

I am pleased to support Senate Bill 909, which will add the interest of a beneficiary of a special needs trust to the list of ownership interests that the State Controller can accept a claim for the property tax postponement program.

Existing law allows the State Controller to loan funds to county tax collectors to pay property taxes on behalf of individuals over the age of 62 or disabled persons with less than \$39,000 in annual income. The State Controller is permitted to secure repayment of any loan by recording a lien against the claimant's property, which is satisfied when the home is sold or refinanced.

SB 909 will clarify the law to allow low-income persons with disabilities to participate in the Senior Citizens and Disabled Citizens Property Tax Postponement Law, regardless of whether their homes are held directly by the individual or in special needs trusts. Preventing these residents from staying in their homes simply because their homes are in trusts is an unintended consequence that needs to be corrected; therefore, I urge your "aye" vote when the bill is heard in your committee on August 3.

Sincerely,

A handwritten signature in blue ink, appearing to read "G. Runner".

GEORGE RUNNER
1st District

cc: Senator Beall
Eric Swanson, Consultant, Assembly Republican Caucus