

David M. Dietsch, CCMA II
City Hall Annex
26 Kendrick Ave., 7th fl.
Waterbury, CT 06702



Armand Carbone, CCMA II
Assistant Assessor
Office: (203) 574-6824
Fax: (203) 574-6992

Sec. 12-81. Exemptions. The following- described property shall be exempt from taxation:

(7) Property used for scientific, educational, literary, historical or charitable purposes. Exception. Subject to the provisions of sections 12-87 and 12-88, the real property of, or held in trust for, a corporation organized exclusively for scientific, educational, literary, historical or charitable purposes or for two or more such purposes and used exclusively for carrying out one or more of such purposes and the personal property of, or held in trust for, any such corporation, provided (A) any officer, member or employee thereof does not receive or at any future time shall not receive any pecuniary profit from the operations thereof, except reasonable compensation for services in effecting one or more of such purposes or as proper beneficiary of its strictly charitable purposes, and provided (B) in 1965, and quadrennial thereafter, a statement shall be filed on or before the first day of November with the assessor or board of assessors of any town and city or consolidated town and borough, in which any of its property claimed to be exempt is situated. Such statement shall be filed on a form provided by such assessor or board of assessors. On and after July 1, 1967, housing subsidized, in whole or in part, by federal, state or local government and housing for persons or families of low and moderate income shall not constitute a charitable a charitable purpose under this section;

Declaration Type \_\_\_\_\_ Initial Application \_\_\_\_\_ Renewal Application

Name of Organization: \_\_\_\_\_

Mailing Address: \_\_\_\_\_

- 1. What are the purposes of this organization:
2. What section of the Connecticut General State Statutes is your organization claiming exempt status? (see reverse side for sections)
3. If not an agricultural or cemetery society, is the gross income of such corporation entirely devoted to scientific educational, literary, historical, charitable, or hospital purposes or two or more such purposes?
4. During the last fiscal year ended \_\_\_\_\_ What was the gross income of the organization? \$ \_\_\_\_\_
What part of such income used for other than its main purpose?
5. During such fiscal year ended \_\_\_\_\_ What were the gross expenditures? \$ \_\_\_\_\_
What part of such income used for other than its main purpose?
6. Agricultural, Horticultural Societies Only: If such corporation is receiving from the State reimbursement in part for cash premiums given at an agricultural or horticultural exhibition held by it in the State, enter the date last reimbursement was received:
7. Cemetery Organization Only: Is its gross income entirely devoted to cemetery purposes?
8. Is any officer, member or employess of the organization receiving, or may he or she at any future time (even in the event of dissolution) receive any pecuniary profit from its operation, except reasonable compensation for services in effecting one or more of its purposes, or as a property beneficiary of its strictly charitable purposes?
9. What would be the disposition of incidental profit, which such organization might make?
10. Does its charter contain any provisions relative thereto? (If yes, submit pertinent sections of the charter.)
11. What would become of the property of such organization in the event of dissolution?
12. Does its charter contain any provisions relative thereto? (If yes, submit pertinent sections of the charter.)

## Tax Exempt Organization Quadrennial Report

13. Has the organization received an IRS exemption in accordance with section 501c? (Attach a copy)

14. On assessment day in the year of the return, specify book and market values of tangible personal property of such organization.

Book Value \$ \_\_\_\_\_ Market Value \$ \_\_\_\_\_

15. Is all tangible personal property devoted to carrying out the purposes for which exemption is claimed? (If not, list items below)  
 \_\_\_\_\_ Yes \_\_\_\_\_ No

16. Describe real estate, giving property location, assessor map/block/lot number, area and uses. (Attach listing if necessary)

17. Is all the real estate being used exclusively for purposes of the organization as stated in item 1?  
 \_\_\_\_\_ Yes \_\_\_\_\_ No

If the answer to item #17 is no, describe below the real estate being used for other purposes.

| Real Estate | Purpose Used | Percentage of Time Used for Other Purposes |
|-------------|--------------|--|
|             |              |  |
|             |              |  |
|             |              |  |

18. Does the reporting organization own any real estate for which no income is derived on the land of which suitable buildings are in the progress of construction, which real estate is exempt from taxation under the first sentence of section 12-88 of the general statutes?

\_\_\_\_\_ Yes \_\_\_\_\_ No

19. Is any portion of the real estate rented? If yes, describe additional remarks below.

\_\_\_\_\_ Yes \_\_\_\_\_ No

Additional Remarks:

**Contact Person:** \_\_\_\_\_ **Telephone #:** \_\_\_\_\_

**Fax No.:** \_\_\_\_\_ **Cell Phone:** \_\_\_\_\_ **Email:** \_\_\_\_\_

**I do hereby declare under oath that, according to the best of my knowledge, remembrance and belief, this report is true.**

**Signed** \_\_\_\_\_ **Date** \_\_\_\_\_ **Title** \_\_\_\_\_  
 (Treasurer or other Chief Financial Officer of the Corp.)

**Subscribed and Sworn to before me:** \_\_\_\_\_ **Date** \_\_\_\_\_

**Signed** \_\_\_\_\_  
 (Justice of the Peace, Notary, Assessor, Town Clerk, Comm-Superior Court)

For additional information, please refer to the Section of the Connecticut General Statutes listed.

|                            |            |                             |            |
|----------------------------|------------|-----------------------------|------------|
| Agricultural Societies     | 12-81 (10) | Horticultural Organizations | 12-81 (10) |
| Cemetery Use               | 12-81 (11) | Hospitals                   | 12-81 (16) |
| Charitable Organizations   | 12-81 (7)  | Literary Organizations      | 12-81 (7)  |
| Determination of Exemption | 12-89      | Partially Exempt Property   | 12-88      |
| Educational Organizations  | 12-81 (7)  | Sanatoriums                 | 12-81 (16) |
| Historical Organizations   | 12-81 (7)  | Scientific Organizations    | 12-81 (7)  |

**Granted**  **Denied**  **Removed**

**Effective Date:** \_\_\_\_\_