



Minnesota Department of Revenue

Robert Doty | Assistant Commissioner

AGE FRIENDLY
minnesota

Mission/Vision/Values

Mission

Working together to fund Minnesota's future.

Vision

Everyone reports, pays, and receives the right amount: no more, no less.

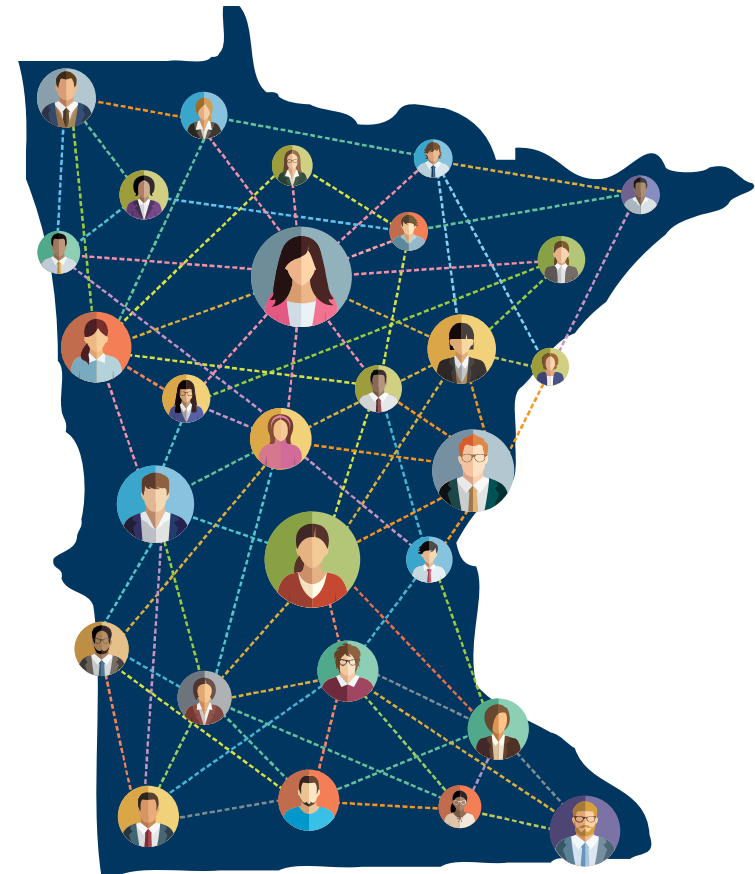
Values

Integrity, Respect, Excellence, and Accountability



Our Customers

- Our broad base of customers
 - 2.9 million individual income tax filers
 - Tax professionals, legislators, military, seniors, farmers
 - Over 800,000 property tax filers
 - 87 counties and 800 licensed property tax assessors
 - 415,000 businesses file and pay
 - 160,000 businesses remit sales tax



Current policies and programs that highlight Age-Friendly

- **Volunteer Income Tax Assistance (VITA)**

- Over 200 locations across the state helping people prepare their income taxes for free.

- **Senior Citizen Property Tax Deferral Program**

- Taxpayers over 65 who meet the income requirement can defer their property taxes.

Form 1040 U.S. Individual Income Tax Return
Department of the Treasury—Internal Revenue Service
For the year Jan. 1–Dec. 31, 2013, or other tax year beginning
Your first name and initial
Last name
If a joint return, spouse's first name and initial
Last name
Home address (number and street). If you have a P.O. box, see instructions
City, town or post office, state, and ZIP code. If you have a foreign address, a

Volunteer Income Tax Assistance (VITA)

- Last year, the VITA program prepared more than 71,000 federal tax returns, more than 75,000 Minnesota income tax returns and almost 57,000 property tax refund returns for Minnesota taxpayers.
 - All those returns provided more than \$133 million in federal, state income, and property tax refunds.
- COVID-19 caused us to rethink how we can provide these services. Starting today we are offering virtual VITA sites.

Highlight a data/report that would inform an Age-Friendly Council

- **Senior Citizen Property Tax Deferral Program: low participation rate**

CY	FY		Participants	Payments	Repayments		Net Fiscal Impact
2017	2018	Final	336	1,258,638	(1,324,963)		(66,325)
2018	2019	est.	308	1,307,250	(1,821,484)		(514,234)
2019	2020	est.	307	1,288,452	(1,198,833)		89,619
2020	2021	est.	305	1,288,452	(1,198,833)		89,619
2021	2022	est.	304	1,288,452	(1,198,833)		89,619
2022	2023	est.	302	1,288,452	(1,198,833)		89,619

Gaps/Opportunities in programs

- **Senior Citizen Property Tax Deferral Program**
 - Outreach
 - Policy Changes



State agency or other government partners

- **Counties**
- **Minnesota Interagency Council on Homelessness**



Thank You!

Robert Doty

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