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Thomas Introduces Bill to Provide Tax Relief to Senior Citizens

Washington DC—At the City Council’s April 7, 2009 legislative session, Ward 5 Councilmember Harry “Tommy” Thomas, Jr. introduced legislation to provide tax relief to the District’s senior citizens. Councilmembers Jack Evans (Ward 2), Yvette Alexander (Ward 7), Michael Brown (At-Large), and Phil Mendelson (At-Large) co-introduced the bill.

The “Pension or Other Retirement Income Exclusion from Income Tax Amendment Act of 2009” increases the amount of pension or annuity income excluded from the computation of income subject to taxation by the District of Columbia. Specifically, the bill:

- Raises from \$3,000 to \$10,000 the maximum annual exclusion for military retired pay, pension income or annuity income from the DC or federal government for persons who are 62 to 64 years of age by the end of the taxable year; and
- Creates a maximum annual exclusion of \$20,000 for military retired pay, pension income or annuity income from the DC or federal government for persons who are 65 years of age or older by the end of the taxable year.

These changes bring the District’s taxation of pension and annuity income more into line with those of other local jurisdictions.

“Most of our seniors are on fixed incomes,” said Councilmember Thomas. “With the rising costs of gas and electricity and other staples, it is becoming harder and harder for our elders to make ends meet. Raising the amount of pension and retirement income that can be excluded from the District’s income tax is something we can do to ease the financial burden that many of our seniors are facing.”

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