

### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: 4/4/2023	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING: ✓	IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES	
		WITNESS NAME			
BUSINESS/ORGAN	ZATION:				
WITNESS NAME: AMBER SMITH			PHONE NUM <b>573-692-0</b>		
BUSINESS/ORGANIZATION NA EMPOWER MISSOURI	ME:			ABLE HOUSING MANAGER	
ADDRESS: <b>P.O. BOX 104900</b>					
CITY: JEFFERSON CITY			STATE: MO	ZIP: <b>65110</b>	
EMAIL: amber.smith@empowe	ermissouri.org	ATTENDANCE: Written	SUBMIT 3/28/2	DATE: <b>023 11:21 AM</b>	

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

March 28, 2023 To: Chairman Baker and Members, Special Date: **Committee on Tax ReformFrom:** Amber Smith, Affordable Housing Policy Manager, Empower MissouriRe: Support for HB 1134Founded in 1901, Empower Missouri is the largest anti -poverty advocacy organization in the state. As part of our work, we organize a statewide Affordable Housing Coalition. This coalition is made up of individuals and organizations who are working to ensure every Missourian has access to safe, affordable, and stable housing. On behalf of our staff, board, and coalition members, I support HB 1134.Among older adults, poverty is linked to an increased risk of disability, physical and cognitive decline and homelessness. Compounding this problem are record inflation rates. In 2022, we saw the worst inflation in nearly 40 years. Inflation, rising property taxes and rising rents are leaving many of our neighbors, particularly seniors and individuals with disabilities, on the brink of ruin. The economic uncertainties following 2020 have made it more likely for the costs of day-to-day living to exceed the income capability of our most vulnerable family members and neighbors. This is especially true upon retirement when incomes generally decrease and become fixed (social security, savings, or pension benefits). A do-pass vote on this bill would provide much needed relief to low income seniors and families. This bill will not only give them more money in their pockets in the form of a tax credit but, it would adjust for inflation which would allow for their money to go further to purchase basic necessities such as food and medicine. Currently, a tax credit is offered to eligible senior citizens and disabled individuals for a portion of the real estate taxes or rent they have paid for the year. This credit currently sits at a maximum of \$750 for renters and \$1,100 for homeowners. HB 1134 raises this tax credit for renters and homeowners to \$1,055 and \$1,550, respectively. There are over 1 million seniors (65+) living in Missouri, close to 18% of our state's total population. According to the Missouri Census Data Center, 9 out of 10 people 65+ live below the poverty level. HB 1134 would ensure that hundreds of thousands of people will be positively impacted by the bills proposed changes. There is no denying that policy supports like this one are needed and will be growing in importance and impact.It is extremely important for decision makers to remember the long term impact today's policies have, and consider the magnitude of those decisions. Population considerations are a huge factor when we think of those impacts. We should look at the changing demographics of our state - of the populations that were and are intended to find relief with circuit breaker taxes like HB 1134.We appreciate Representative Matthiesen's leadership in introducing this bill and urge you to support its approval.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPOSES	
		WITNESS NAME			
<b>BUSINESS/ORG</b>	ANIZATION:				
WITNESS NAME: AMBER SMITH			PHONE NUME <b>573-692-0</b>		
BUSINESS/ORGANIZATIO			AFFORDA POLICY N	ABLE HOUSING IANAGER	
ADDRESS: <b>P.O. BOX 104900</b>					
CITY: JEFFERSON CITY			STATE: MO	ZIP: <b>65110</b>	
EMAIL: amber.smith@emp	powermissouri.org	ATTENDANCE: Written	SUBMIT 0 3/30/20	DATE: 123 8:56 PM	

### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

April 4, 2023 To: Chairman Baker and Members, Special Committee on Tax ReformFrom: Amber Smith, Affordable Housing Policy Manager, Empower MissouriRe: Support for HB 1134Founded in 1901, Empower Missouri is the largest anti-poverty advocacy organization in the state. As part of our work, we organize a statewide Affordable Housing Coalition. This coalition is made up of individuals and organizations who are working to ensure every Missourian has access to safe, affordable, and stable housing. On behalf of our staff, board, and coalition members, I support HB 1134.Among older adults, poverty is linked to an increased risk of disability, physical and cognitive decline and homelessness. Compounding this problem are record inflation rates. In 2022, we saw the worst inflation in nearly 40 years. Inflation, rising property taxes and rising rents are leaving many of our neighbors, particularly seniors and individuals with disabilities, on the brink of ruin. The economic uncertainties following 2020 have made it more likely for the costs of day-to-day living to exceed the income capability of our most vulnerable family members and neighbors. This is especially true upon retirement when incomes generally decrease and become fixed (social security, savings, or pension benefits).A do-pass vote on this bill would provide much needed relief to low income seniors and families. This bill will not only give them more money in their pockets in the form of a tax credit but, it would adjust for inflation which would allow for their money to go further to purchase basic necessities such as food and medicine. Currently, a tax credit is offered to eligible senior citizens and disabled individuals for a portion of the real estate taxes or rent they have paid for the year. This credit currently sits at a maximum of \$750 for renters and \$1,100 for homeowners. HB 1134 raises this tax credit for renters and homeowners to \$1,055 and \$1,550, respectively. There are over 1 million seniors (65+) living in Missouri, close to 18% of our state's total population. According to the Missouri Census Data Center, 9 out of 10 people 65+ live below the poverty level. HB 1134 would ensure that hundreds of thousands of people will be positively impacted by the bills proposed changes. There is no denying that policy supports like this one are needed and will be growing in importance and impact.It is extremely important for decision makers to remember the long term impact today's policies have, and consider the magnitude of those decisions. Population considerations are a huge factor when we think of those impacts. We should look at the changing demographics of our state - of the populations that were and are intended to find relief with circuit breaker taxes like HB 1134.We appreciate Representative Matthiesen's leadership in introducing this bill and urge you to support its approval.



BILL NUMBER: HB 1134				DATE: 4/4/2023
COMMITTEE: Special Committee on Tax Reform				
TESTIFYING:	<b>☑</b> IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	NATIONAL PURPOSES
		WITNESS NAME		
INDIVIDUAL:				
WITNESS NAME: ARNIE C."HONEST-ABE" DIENOFF-STATE PUBLIC ADVOCATE  PHONE NUMBER:				BER:
BUSINESS/ORGANIZATION	ON NAME:		TITLE:	
ADDRESS:	ADDRESS:			
CITY:			STATE:	ZIP:
EMAIL: arniedienoff@yah	oo.com	ATTENDANCE: Written	SUBMIT 4/4/20	DATE: <b>23 11:52 PM</b>
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.				

I am in Support of this Bill.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: 4/4/2023	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	☑ IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES	
		WITNESS NAME			
BUSINESS/ORG	ANIZATION:				
WITNESS NAME: BARBARA J. ITTN	ER		PHONE NUM <b>417-214-7</b>		
BUSINESS/ORGANIZATIO SILVER HAIRED L			SILVER H LEGISLA PAST PR	TURE IMMEDIATE	
ADDRESS: 4099 W STATE HW	VY 76				
CITY: ANDERSON			STATE: MO	ZIP: <b>64831</b>	
EMAIL: BJITTNER454@GI	MAIL.COM	ATTENDANCE: Written	SUBMIT 3/27/2	DATE: <b>023 11:40 AM</b>	

THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

Thank you for considering HB 1134. Property tax relief is one of the five priorities of the Silver Haired Legislature. Updating the Circuit Breaker with new limits would help an additional 142,000 households without impacting local government. As a former volunteer with VITA (Volunteer Income Tax Assistance) with 17 years of experience, I have seen how important the property tax credits are to low income fullyear Missouri residents. The program helps homeowners, renters and residents of certain facilities such as skilled nursing homes receive a rebate for a portion of paid property tax. Recipients of the credits frequently shared stories of what they were going to do as soon as the check arrived. One individual had been out of hot water for a period of time and planned to shop for a new hot water heater. Another hoped to get the car repaired. A lady was going to repay a loan from a friend that allowed her to actually pay her taxes. Words here do not describe the emotion these folks felt about getting this help. The original Circuit Breaker was established 60 years ago (1973). The last program adjustment was in 2008. Over the years property taxes have increased as has income but the qualifying limits have been stagnant. It is time to increase both. HB 1134 will do that as well as add an inflation rider. In 2021 the average rebate per county ranged from \$409 to \$692. At minimum pass an inflation rider to the Circuit Breaker. Hopefully you will also increase the income eligibility limits as well as the maximum credit limit.



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>	
COMMITTEE: Special Committee	e on Tax Reform				
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO		ATIONAL PURPOSES	
		WITNESS NAME			
REGISTERED LO	DBBYIST:				
WITNESS NAME: BRIAN COLBY			PHONE NUME 206-769-3		
REPRESENTING:			TITLE:		
ADDRESS: 6441 VALLEY RD.					
CITY: KANSAS CITY			STATE: MO	ZIP: <b>64113</b>	
EMAIL:		ATTENDANCE:	SUBMIT 0 4/4/202	DATE: 2 <b>3 12:00 AM</b>	
THE INFORMAT	TION ON THIS EOD	M IS DUBLIC DECOR	D LINDED CHA	DTED 610 DSMo	



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee on	Tax Reform			
TESTIFYING: ✓	IN SUPPORT OF	IN OPPOSITION TO		ATIONAL PURPOSES
		WITNESS NAME		
BUSINESS/ORGAN	IZATION:			
WITNESS NAME: CLAIRE HUNDELT			PHONE NUMB 314-265-44	
BUSINESS/ORGANIZATION NA MARILLAC MISSION F			TITLE:	
ADDRESS: 4600 EDMUNDSON				
CITY: ST. LOUIS			STATE: MO	ZIP: <b>63134</b>
EMAIL: claire.hundelt@mmfst	tl.org	ATTENDANCE: In-Person	SUBMIT D 3/27/202	ATE: <b>23 4:32 PM</b>
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610. RSMo.				



#### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: 4/4/2023	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	✓ IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES	
		WITNESS NAME			
BUSINESS/ORG	ANIZATION:				
WITNESS NAME: DAVID STOKES			PHONE NUM <b>314-454-0</b>		
BUSINESS/ORGANIZATION NAME: SHOW-ME INSTITUTE  DIRECTOR OF MUNICIPAL POLICY			R OF MUNICIPAL		
ADDRESS: 5297 WASHINGTON PLACE					
CITY: ST. LOUIS			STATE: MO	ZIP: <b>63108</b>	
EMAIL: david.stokes@sho	owmeinstitute.org	ATTENDANCE: Written	SUBMIT 3/28/2	DATE: 023 10:28 AM	

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

TO THE HONORABLE MEMBERS OF THIS COMMITTEE:Thank you for the opportunity to testify. My name is David Stokes, and I am director of municipal policy at the Show-Me Institute, a nonprofit, nonpartisan, Missouri-based think tank that advances sensible, well-researched, free-market solutions to state and local policy issues. The ideas presented here are my own and are offered in consideration of proposals that will address the implementation and expansion of Missouri's property tax circuitbreaker program. According to Missouri law, residential property is one of three subclasses of real property and is defined as follows1: "Residential property", all real property improved by a structure which is used or intended to be used for residential living by human occupants, vacant land in connection with an airport, land used as a golf course, manufactured home parks, bed and breakfast inns in which the owner resides and uses as a primary residence with six or fewer rooms for rent. and time-share units as defined in section 407.600, except to the extent such units are actually rented and subject to sales tax under subdivision (6) of subsection 1 of section 144.020, but residential shall not include other similar facilities used primarily for transient housing [...]. In practical terms, this means that you pay annual property taxes on the house, apartment, or condominium you reside in. You may pay the tax at the end of the year directly to the county collector. You may pay it directly each month as part of your mortgage payment. Or, you may pay it indirectly each month as part of your rent to a landlord. Every two years, the value of all real property in Missouri is reassessed, and the value of your residence is supposed to be set at the market value of the land and buildings. A 19% assessment ratio is then applied to the market value, and your taxes are based on that final assessed value depending, of course, on the combined tax rate where you live or own property.To calculate taxes owed on a \$100,000 home at an \$8.00 total combined tax rate per \$100 of assessed valuation:1.  $100,000 \times 0.19 (19\%) = $19,0002$ . 19,000 / 100 × 8.00= \$1,520 owed in taxes\$1,520 in real estate taxes can be a substantial amount of money for lower-income residents, senior citizens on fixed incomes, and people with disabilities. Missouri has created the "circuit breaker" program to help address that issue. This program provides an income tax credit to senior citizens and disabled persons below a certain income level to help offset the property tax burden. Programs such as the "circuit breaker" are a more effective method of helping people who are burdened by the property tax than many other proposals. As the Lincoln Institute for Land Policy explains2: By targeting property tax relief to those most in need of relief, circuit breakers promote tax equity at minimal cost budget while preserving the basic nature and strengths of the property tax. HB 1134 expands Missouri's existing "circuit breaker" program by increasing the allowable tax credit for both homeowners and renters and tying that maximum credit to inflation in the future. It also increases the maximum level of income eliqibility for the program and ties that income eliqibility level to inflation

going forward. The expansions and increases in the credit amount and eligibility levels are modest. They still maintain the focus of the program on lower-income senior citizens and disabled persons, as it should be. That focus on lower-income senior citizens and disabled persons is one of the more beneficial aspects of Missouri's program. Our property tax system works best when the assessments are accurate, the base is wide, and the rates are low. HB 1134 helps to maintain the benefits of our property tax system while assisting those for whom it genuinely imposes a significant burden. HB 1134 is good public policy and the program expansions and changes proposed in the bill will benefit Missouri. NOTES1. RSMO 137.016(1)2. Lincoln Institute of Land Policy, "Property Tax Circuit Breakers," Policy Focus Report, 2009.



BILL NUMBER: HB 1134				DATE: 4/4/2023
COMMITTEE: Special Committee on Tax Reform				
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES
		WITNESS NAME		
BUSINESS/ORG	ANIZATION:			
WITNESS NAME: DONNA SMITH-PU	IPILLO		PHONE NUM <b>314-324-3</b>	
BUSINESS/ORGANIZATION DEACONESS NUR			TITLE: EXECUTI	VE DIRECTOR
ADDRESS: 3159 FEE FEE ROAD, SUITE 225				
CITY: BRIDGETON			STATE: MO	ZIP: <b>63044</b>
EMAIL: dpupillo@faithnur	ses.org	ATTENDANCE: Written	SUBMIT <b>3/27/2</b>	DATE: 023 9:05 AM

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

The nurses of Deaconess Nurse Ministry help seniors and disabled complete circuit breaker forms. I have personally helped our low income seniors get the assistance that the circuit breaker gives. The seniors we see live on less than \$20,000 a year and come to food pantries to supplement their food insecurity needs. One senior, a retired school cook, who lived on \$19,890, was able to with the circuit breaker funds was able to keep her electric on in the summer as a result, thus helping her stay safe and cool. We have seen that the circuit breaker rebate funds are used by the seniors and disabled to pay bills and purchase supplies that they need. The circuit breaker has not been updated for several years, and does not effect the funding for schools and municipalities, but does enhance the lives of those who are most vulnerable in our state.



#### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	☑ IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES	
		WITNESS NAME			
BUSINESS/ORG	ANIZATION:				
WITNESS NAME: JAMIE OPSAL			PHONE NUM	MBER:	
BUSINESS/ORGANIZATION ST. LOUIS CITY S			TITLE: EXECUT	IVE DIRECTOR	
ADDRESS:					
CITY: SAINT LOUIS			STATE: MO	ZIP: <b>63103</b>	
EMAIL: info@stlseniorfun	d.org	ATTENDANCE: Written	SUBMIT 3/27/2	DATE: 2023 2:52 PM	

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

We support improvements to the Property Tax Credit program (aka Circuit Breaker) proposed by HB1134 filed by Representative Matthiesen. Housing expenses are a significant challenge for many Missouri residents. The Property Tax Credit program has provided valuable assistance for residents by offsetting housing expenses related to property taxes. In nearly half of Missouri counties, property taxes support much needed services for older residents with support of senior levy funds. For example, in St. Louis City property tax revenue helps support home repair programs, dental care not covered by Medicaid or Medicare, personal care and chore assistance, legal services, care coordination for individuals with dementia, hearing aids, and many other services. Many Missourians have consistently supported local tax increases in the past to support these and other services for themselves and their neighbors. However, we recognize that for some residents, increasing property values and increases in property taxes can significantly affect their ability to afford their home. Though the average credit is just \$50/month or \$600/year, the program is a critical lifeline for over 100,000 households throughout the state. An essential part of this program is that it applies to both homeowners AND renters (who often see increased taxes carried over into their rent). It has been 15 years since the program has been adjusted. HB1134 offers important updates to the program to reflect inflation by raising the credits and income eligibility limits and increasing them annually for inflation. It also includes adjusting the incremental phase out of the credit based on income. Currently only residents who have a household income below \$14,300 can receive the maximum credit. The credit amount significantly decreases for anyone with incomes above that amount. Residents who are eligible to apply but have income near the eligibility cap can receive credits less than \$10, some at the top qualify for \$0 in support. Adjustment to the phaseout, in addition to income eligibility and credit amount, are essential for supporting Missourians who need assistance with increasing housing expenses across our state. Thank you for supporting the housing-related needs of your constituents and fellow Missourians by favorably considering this bill.



#### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DAT <b>4/4</b>	E: / <b>2023</b>
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO		NFORMATIO	NAL PURPOSES
		WITNESS NAME			
BUSINESS/ORG	ANIZATION:				
WITNESS NAME: JAMIE OPSAL			PHO	ONE NUMBER:	
BUSINESS/ORGANIZATION ST. LOUIS CITY SE			TITI <b>EX</b>	LE: <b>ECUTIVE DI</b>	RECTOR
ADDRESS:					
CITY: SAINT LOUIS			STA MC		ZIP: <b>63103</b>
EMAIL: info@stlseniorfund	l.org	ATTENDANCE: Written		SUBMIT DATE: 4/3/2023 1:0	08 PM

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

On behalf of the St. Louis City Senior Fund, I am writing in support of improvements to the Property Tax Credit program (aka Circuit Breaker) proposed by HB1134 filed by Representative Matthiesen. Housing expenses are a significant challenge for Missouri residents and more and more Missourians have been affected by increasing housing expenses. The Property Tax Credit program has provided valuable assistance for residents by offsetting housing expenses related to property taxes. In nearly half of Missouri counties, property taxes support much needed services for older residents. For example, in St. Louis City property tax revenue helps support home repair programs, dental care not covered by Medicaid or Medicare (e.g., dentures), personal care and chore assistance, legal services, care coordination for individuals with dementia, hearing aids, and many other services. Many Missourians have consistently supported local tax increases in the past to support these and other services for themselves and their neighbors. However, we recognize that for some residents, increasing property values and increases in property taxes can significantly affect their ability to afford their home. Though the average credit is just \$600/year, the program is a critical lifeline for over 100,000 households throughout the state. An essential part of this program is that it applies to both homeowners AND renters (who often see increased taxes carried over into their rent). It has been 15 years since the program has been adjusted. HB1134 offers needed updates to the program to reflect inflation. It also includes an important element of adjusting the incremental phase out of the credit based on income. Adjustment to the phaseout, in addition to income eligibility and credit amount, are important for supporting Missourians who need assistance with increasing housing expenses across our state. Thank you for supporting the housing-related needs of your constituents and fellow Missourians.



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee	e on Tax Reform			
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPOSES
		WITNESS NAME		
<b>BUSINESS/ORG</b>	ANIZATION:			
WITNESS NAME: JAY HARDENBRO	юк		PHONE NUME <b>816-810-2</b>	
BUSINESS/ORGANIZATIO	ON NAME:		TITLE: ADVOCAC	CY DIRECTOR
ADDRESS: 4031 PARKER AVE				
CITY: SAINT LOUIS			STATE: <b>MO</b>	ZIP: <b>63116</b>
EMAIL: jhardenbrook@aai	rp.org	ATTENDANCE: In-Person	SUBMIT [ 3/28/20	DATE: 123 1:54 PM
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.				



BILL NUMBER: HB 1134			DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee on Tax Refo	orm		•
TESTIFYING: ✓IN SUPP	ORT OF IN OPPOSITION	ON TO FOR INFORM	NATIONAL PURPOSES
	WITNESS NAM	ΛE	
BUSINESS/ORGANIZATIO	N:		
WITNESS NAME: JAY HARDENBROOK		PHONE NUM <b>816-810-2</b>	
BUSINESS/ORGANIZATION NAME: AARP		TITLE: ADVOCA	CY DIRECTOR
ADDRESS: 4031 PARKER AVE			
CITY: SAINT LOUIS		STATE: MO	ZIP: <b>63116</b>
EMAIL: jhardenbrook@aarp.org	ATTENDANCE: In-Person	SUBMIT 4/4/20	DATE: <b>23 11:47 AM</b>
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610. RSMo.			



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: 4/4/2023
COMMITTEE: Special Committee	e on Tax Reform			
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	MATIONAL PURPOSES
		WITNESS NAME		
REGISTERED LO	OBBYIST:			
WITNESS NAME: JEANETTE MOTT	OXFORD		PHONE NUM <b>314-289-</b> 4	
REPRESENTING: PARAQUAD, INC.			TITLE: PUBLIC F MANAGE	POLICY & ADVOCACY
ADDRESS: 5240 OAKLAND A	VENUE			
CITY: ST. LOUIS			STATE: MO	ZIP: <b>63110</b>
EMAIL: joxford@paraquad	d.org	ATTENDANCE: Written	SUBMIT <b>4/4/20</b>	DATE: <b>23 10:18 AM</b>

### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

Paraquad thanks Rep. Matthiesen for sponsoring HB 1134. This is a much-needed updating of Missouri's Circuit Breaker policy. Unfortunately, people living with disabilities have a poverty rate that is more than twice as high as people without disabilities. The household budget of many Missourians with disabilities is helped by the Circuit Breaker. The amount of help that people receive has eroded though because the Circuit Breaker income guidelines and credit have not been adjusted since 2008 – 15 years ago.Rep. Matthiesen's bill would increase the income limit in recognition of the real cost of living and would also increase the credit. It would index the program to inflation so that its benefit does not erode going forward. Making this change helps elders and people with disabilities stay in their homes and afford basic human needs.We ask that you vote Do Pass on HB 1134.About Paraquad: We are one of the oldest and largest independent living centers in the country. Centers for Independent Living are unique because more than 50% of our board and staff are people with disabilities. Paraquad's mission is to increase equity and independence for people with disabilities through services, partnerships, education, and advocacy.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>	
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	<b>☑</b> IN SUPPORT OF	☐ IN OPPOSITION TO	FOR INFORMAT	TIONAL PURPOSES	
		WITNESS NAME			
INDIVIDUAL:					
WITNESS NAME: JENNIFER M. BRII	NSON		PHONE NUMBER	₹:	
BUSINESS/ORGANIZATIO	ON NAME:		TITLE:		
ADDRESS:					
CITY:			STATE:	ZIP:	
EMAIL: jennifer53@centui	rytel.net	ATTENDANCE: Written	SUBMIT DAT 4/3/2023	TE: 9:08 PM	

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

As a disabled & close to being a senior citizen I am completely in favor of this bill. My husband & I have been living on just our Social Security due to many medical issues over the years. Due to his illnesses he passed away on March 27, 2023. I think if my representatives can make these changes it would help a lot of elderly & disabled, some of us are living on a very restricted amount & have to worry about when there are 5 weeks between checks instead of the usual 4 weeks plus the added burden of inflation & skyrocketing gas prices cause us to truly decide between food, fuel, medicines, paying rent or mortgage & utilities let alone maintaining a home. Due to my husband's passing I will now have to figure out how to do all this with only 1 check a month. Seniors & disabled do not raise a ruckus or go out & protest about issues so we are not as readily seen or heard but we are here, we live, breath, pay taxes & vote. We are only asking for help up, an adjustment to the income levels regarding real estate tax rebates could literally be a lifeline to many.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134			ATE: <b>/4/2023</b>
COMMITTEE: Special Committee on Tax Reform		·	
<b>TESTIFYING</b> : ✓ IN SUPPORT OF	☐ IN OPPOSITION TO ☐	FOR INFORMAT	IONAL PURPOSES
	WITNESS NAME		
INDIVIDUAL:			
WITNESS NAME: JILL L MARSHALL		PHONE NUMBER:	
BUSINESS/ORGANIZATION NAME:		TITLE:	
ADDRESS:			
CITY:		STATE:	ZIP:
EMAIL: jillmarshall999@gmail.com	ATTENDANCE: Written	SUBMIT DATE 4/3/2023 7	: :53 PM

### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

I Support this Circuit Breaker Tax Bill. It's time that the State of Missouri Start Helping Senior Citizens and People who are in Disability. These Wonderful People Should Received What is There's. My Mother is 82 Years Old, and have been in her Home Since 1987. MY MOTHER CAME TO SAINT LOUIS IN MARCH OF 1962, THAT IS A VERY LONG TIME. SHE IS ON A FIXED INCOME, I HOPE AND PRAY, THAT THE COMMITTEE'S DO THE RIGHT THING, BY PASSING THIS BILL IMMEDIATELY, AND GOING BACK 5 YEARS, BECAUSE THESE PEOPLE HAVE PAID THERE DUES. THEY HAVE WORKED SO HARD ALL THERE LIVES. MISSOURI IS CALLED THE SHOW ME STATE, WELL LET GET THIS DONE, ONCE AND FOR ALL.



# WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: 4/4/2023
COMMITTEE: Special Committee	e on Tax Reform			
TESTIFYING:	☑ IN SUPPORT OF	☐ IN OPPOSITION TO		ATIONAL PURPOSES
		WITNESS NAME		
INDIVIDUAL:				
WITNESS NAME: JUDITH A CAMPB	ELL		PHONE NUME	BER:
BUSINESS/ORGANIZATIO	ON NAME:		TITLE:	
ADDRESS:				
CITY:			STATE:	ZIP:
EMAIL: jacampbell314@g	mail.com	ATTENDANCE: Written	SUBMIT D 3/27/20	DATE: 23 4:46 PM
THE INFORMA	TION ON THIS FORM	IS PUBLIC RECORD	LINDER CHA	PTER 610 RSMo

I support this bill as it would: (1) increase the amount of the credit (2) update income eligibility guidelines (3) index them both to inflation in the future, and (4) adjust how the credit is phased out. This is the right thing to do. Thank you.



#### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134			DATE: <b>4/4/2023</b>		
COMMITTEE: Special Committee on Tax Reform					
<b>TESTIFYING</b> :  ☑IN SUPPORT OF	☐ IN OPPOSITION TO	FOR INFORM	ATIONAL PURPOSES		
	WITNESS NAME				
INDIVIDUAL:					
WITNESS NAME: KATHERINE KELLER		PHONE NUME	BER:		
BUSINESS/ORGANIZATION NAME:		TITLE:			
ADDRESS:					
CITY:		STATE:	ZIP:		
EMAIL: katherine.keller@mmfstl.org	ATTENDANCE: Written	SUBMIT 0 4/4/202	OATE: 13 2:36 PM		

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

I previously worked as a community case manager with adults with disabilities, mostly severe mental illness. Most were on SSI and lived alone, with community support. They were not able to work. At the time (2009, after the last time the Circuit Breaker was updated), the maximum SSI benefit was \$674 per month. It is now \$841 for an individual, which does not even cover median rent for a one-bedroom apartment in St. Louis. In my current work at a private foundation supporting programs that help older adults remain living independently, I have heard many similar stories about the impact of the Circuit Breaker, some of which are below:- "My brother helps mom file the Circuit Breaker. She gets \$300 -\$350 back every year. That money goes towards food, medicine, and every day living like the gas bill. You know, our seniors need more. She doesn't get enough in food stamps. Some of her medicines are covered, but some of them are not. She has to cover those costs out of her pocket. That little bit of money goes back out to pay for all these things."-"Assisted a 76-year-old white female from St. Louis City with PTC 2019, 2020, and 2021 applications. These applications were accepted, and the client received a total refund of \$1,372. She is a homeowner, and this refund increased her monthly disposable income as well as paying \$1,362 owed for 2022 property tax." -"Assisted a 67-year-old African American male from St. Louis City with PTC 2022 application. Client is a renter and only receives SSI with an annual income of \$10092. He will receive a refund of \$336 which will increase his monthly disposable income." -"Assisted a 63-year-old disabled white female from St. Louis City with PTC 2021 application. This application was accepted, and the client received a refund of \$736. She is a homeowner and living with an annual income of only 10,762. This refund increased her monthly disposable income and allowed her to continue to afford her basic needs." -"We hear so often from our clients how their property taxes continue to rise, but unfortunately not at the same rate of their fixed incomes. While the Circuit Breaker Property Tax Credit helps to offset the cost some, it definitely is starting to cover less and less. We have seen that many of our clients that live in neighborhoods that have experienced gentrification recently have been hit the hardest. Looking at four clients who live in these neighborhoods and nearby, we discovered their average annual income is \$23,700, which equals about \$1,975 per month. While their average amount of Property Taxes for 2022 was \$2,346. This is obviously higher than the average monthly fixed income for these clients. As you can imagine, living with a very limited budget of under \$2,000 a month, does not allow for much leeway outside of necessary purchases, let alone tucking an extra percentage of that away to be put towards annual property taxes due in December."



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee	e on Tax Reform		·	
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPOSES
		WITNESS NAME		
REGISTERED LO	OBBYIST:			
WITNESS NAME: KAYCEE NAIL			PHONE NUMB 314-630-57	
REPRESENTING: MISSOURI ASSOC	IATION OF THE AREA	AGENCIES ON AGING	TITLE:	
ADDRESS: PO BOX 684				
CITY: JEFFERSON CITY			STATE: MO	ZIP: <b>65102</b>
EMAIL: kaycee@penman.g	group	ATTENDANCE: Written	SUBMIT D 4/4/202	OATE: 03 3:46 PM
THE INFORMAT	TION ON THIS FORM	I IS PUBLIC RECORI	D UNDER CHA	PTER 610. RSMo.



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee on Tax Re	eform			
TESTIFYING: ✓IN SUF	PPORT OF IN	OPPOSITION TO	☐FOR INFORMA	ATIONAL PURPOSES
	WIT	NESS NAME		
REGISTERED LOBBYIST	:			
WITNESS NAME: KAYCEE NAIL			PHONE NUMB 314-630-57	
REPRESENTING: MISSOURI ASSOCIATION OF	AREA AGENCIES	(MA4)	TITLE:	
ADDRESS: PO BOX 684				
CITY: JEFFERSON CITY			STATE: MO	ZIP: <b>65102</b>
EMAIL: kaycee@penman.group		NDANCE: Person	SUBMIT D 4/4/202	ATE: 3 1:10 PM
THE INFORMATION ON	THIS FORM IS P	UBLIC RECORE	UNDER CHAI	PTER 610, RSMo.

Missouri Association of Area Agencies on Aging (ma4)



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>	
COMMITTEE: Special Committee	e on Tax Reform				
TESTIFYING:	<b>☑</b> IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPO	SES
		WITNESS NAME			
INDIVIDUAL:					
WITNESS NAME: MAHREE SKALA			PHONE NUME	BER:	
BUSINESS/ORGANIZATIO	ON NAME:		TITLE:		
ADDRESS:			•		
CITY:			STATE:	ZIP:	
EMAIL: <b>skalamahree@yah</b>	noo.com	ATTENDANCE: Written	SUBMIT I 3/27/20	DATE: 123 3:40 PM	
THE INFORMA	TION ON THIS FORM	MIS DUBLIC DECOR	D LINDED CHA	DTED 610 DQN	40

This bill would be very beneficial to low-income seniors and disabled people. It would bring the qualifying standards up to date and provide much-needed relief to folks whose tax bills keep going up much faster than their incomes.



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee	on Tax Reform			
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPOSES
		WITNESS NAME		
BUSINESS/ORG	ANIZATION:			
WITNESS NAME: MALLORY RUSCH			PHONE NUME <b>314-306-8</b>	
BUSINESS/ORGANIZATIO EMPOWER MISSO			TITLE: EXECUTIV	/E DIRECTOR
ADDRESS: PO BOX 104900				
CITY: JEFFERSON CITY			STATE: MO	ZIP: <b>65110</b>
EMAIL:		ATTENDANCE:	SUBMIT 0 4/4/202	DATE: 23 12:00 AM
THE INFORMAT	TION ON THIS FOR	M IS PUBLIC RECOR	D UNDER CHA	PTER 610. RSMo.



## WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committe	e on Tax Reform		·	
TESTIFYING:	✓ IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORMA	TIONAL PURPOSES
		WITNESS NAME		
INDIVIDUAL:				
WITNESS NAME: MICHELE COLEM	AN		PHONE NUMBE	ER:
BUSINESS/ORGANIZATION	ON NAME:		TITLE:	
ADDRESS:				
CITY:			STATE:	ZIP:
EMAIL: colemanm@stlou	is-mo.gov	ATTENDANCE: Written	SUBMIT DA 3/27/202	ATE: 23 8:31 AM

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

I am in support of this bill for the following reasons;I work with seniors/disabled population daily. Most seniors average income is below \$1200 per month. Disabed is an average of \$906 per month. This amount is with the inflation increase given this year. My salary is double that and I find it hard to budget my bills some months. We will all be seniors one day and any additional financial support helps out tremendously.



BILL NUMBER: HB 1134				DA <sup>-</sup>	TE: 1/2023
COMMITTEE: Special Committee	e on Tax Reform				
TESTIFYING:	☑ IN SUPPORT OF	☐ IN OPPOSITION TO	FOR	INFORMATIC	NAL PURPOSES
		WITNESS NAME			
INDIVIDUAL:					
WITNESS NAME: NANCY KOEHLER			Ph	HONE NUMBER:	
BUSINESS/ORGANIZATIO	N NAME:		T!	TLE:	
ADDRESS:			•		
CITY:			ST	TATE:	ZIP:
EMAIL: koehlernancy@gm	nail.com	ATTENDANCE: Written	·	SUBMIT DATE: 3/27/2023 8	:49 PM

### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

This bill will improve Missouri's Circuit Breaker tax credit Law SB 15 for those citizens who need it. I encourage the Senators to vote increase the amount of the credit, update eligibility guidelines and to index them to inflation in the future. My husband and I are having to decide if we need to move out of St. Louis County because of the steady rise in property tax. We are both retired and it is harder to pay this increasing tax.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134			DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee on Tax Reform			
TESTIFYING: ✓IN SUPPORT OF	□ IN OPPOSITION TO		ATIONAL PURPOSES
	WITNESS NAME		
INDIVIDUAL:			
WITNESS NAME: SAMANTHA LEHDE		PHONE NUME	BER:
BUSINESS/ORGANIZATION NAME:		TITLE:	
ADDRESS:		•	
CITY:		STATE:	ZIP:
EMAIL: Sam@missionstl.org	ATTENDANCE: Written	SUBMIT 0 3/27/20	DATE: 123 3:11 PM

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

We hear so often from our home repair clients how their property taxes continue to rise, but unfortunately not at the same rate of their fixed incomes. While the Circuit Breaker Property Tax Credit helps to offset the cost some, it definitely is starting to cover less and less. We have seen that many of our clients that live in neighborhoods that have experienced gentrification recently have been hit the hardest, Neighborhoods such as Tower Grove East and Forest Park Southeast within St. Louis City. Looking at four clients who live in these neighborhoods and nearby, we discovered their average annual income is \$23,700, which equals about \$1,975 per month. While their average amount of Property Taxes for 2022 was \$2,346. This is obviously higher than the average monthly fixed income for these clients. As you can imagine, living with a very limited budget of under \$2,000 a month, does not allow for much leeway outside of necessary purchases, let alone tucking an extra percentage of that away to be put towards annual property taxes due in December. Recently, we've found that many of our clients' homes are extremely dark. When asked about this, they disclosed that the cost of light bulbs was too much, if they also wanted to ensure they had enough money for groceries. It becomes a weighted decision on which need is greater - arguably, one that seniors in our community should not have to make. Adjusting the Missouri Circuit Breaker Property Tax Credit would offer these folks muchneeded relief, at a crucial time. The current rate is simply not sustainable for them in continuing to pay such high property taxes.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committe	e on Tax Reform		•	
TESTIFYING:	<b>☑</b> IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORMA	TIONAL PURPOSES
		WITNESS NAME		
INDIVIDUAL:				
WITNESS NAME: STEPHANIE HERE	BERS		PHONE NUMBE	R:
BUSINESS/ORGANIZATION	ON NAME:		TITLE:	
ADDRESS:			•	
CITY:			STATE:	ZIP:
EMAIL: sherbers@gmail.c	com	ATTENDANCE: Written	SUBMIT DATE: 3/27/2023 10:27 AM	

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

As a lifelong Missourian who works in a field focused on supporting older adults aging in community. I am writing in support of improvements to the Property Tax Credit program (aka Circuit Breaker) proposed by HB1134 filed by Representative Matthiesen. Housing expenses are a significant challenge for Missouri residents and more and more Missourians have been affected by increasing housing costs. The Property Tax Credit program has provided valuable assistance for residents by offsetting housing expenses related to property taxes. Property taxes support many important services, but, as you know, can also be a challenge for some residents as they increase over time. Though the average credit is just \$600/year, the program is a critical lifeline for over 100,000 households throughout the state. An essential part of this program is that it applies to both homeowners AND renters (who often see increased taxes carried over into their rent). As a volunteer at a tax assistance site, I have talked with many applicants of the credit program who plan to use their refund for basic needs such as food, winter utilities, personal care and home supplies (e.g., needed dental care, a new mattress), or as a savings for homeowners to be able to pay their next year's real estate tax. It has been 15 years since the program has been adjusted. HB1134 offers important updates to the program to reflect inflation by raising the credits and income eligibility limits and increasing them annually for inflation. It also includes an important element of adjusting the incremental phase out of the credit based on income. Currently only residents who have a household income below \$14,300 can receive the maximum credit (\$750 or \$1,100). The credit amount significantly decreases for anyone with incomes above that amount. Residents who are eligible to apply but have income near the eligibility maximum can receive credits less than \$10, some at the top qualify for \$0 in support. Adjustment(s) to the phaseout, in addition to income eligibility and credit amount, is essential for supporting Missourians who need assistance with increasing housing expenses across our state. Thank you for support the housingrelated needs of your constituents and fellow Missourians when you favorably consider this bill.



### WITNESS APPEARANCE FORM

BILL NUMBER: HB 1134				DA1 <b>4/4</b>	TE: <b>1/2023</b>
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFOR	RMATIC	NAL PURPOSES
		WITNESS NAME			
INDIVIDUAL:					
WITNESS NAME: PHONE NUMBER: STEPHANIE HERBERS					
BUSINESS/ORGANIZATION N	AME:		TITLE:		
ADDRESS:					
CITY:			STATE:		ZIP:
EMAIL: sherbers@gmail.com		ATTENDANCE: Written		IT DATE: 2023 1:0	05 PM

#### THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.

I am writing in support of improvements to the Property Tax Credit program (aka Circuit Breaker) proposed by HB1134 filed by Rep. Matthiesen. Housing expenses are a significant challenge for St. Louisans and other Missouri residents. The Property Tax Credit program has provided valuable assistance for residents by offsetting housing expenses related to property taxes. Property taxes support many important services, but can also be a challenge for some residents as they increase over time. The Property Tax Credit program provides tax assistance for residents while maintaining local revenue that supports important services for our community. Though the average credit is equivalent to just \$50/month, the program is a critical lifeline for over 100,000 households throughout the state. As a volunteer at a tax assistance site, I have talked with many applicants of the credit program who plan to use their refund for basic needs such as food, winter utilities, personal care and home supplies (e.g., needed dental care, a new mattress), or as a savings for homeowners to be able to pay their next year's real estate tax. HB1134 offers needed updates to the program to reflect inflation. It also includes an important element of adjusting the incremental phase out of the credit based on income. Currently only residents who have a household income below \$14,300 can receive the maximum credit (\$750 or \$1,100). The credit amount significantly decreases for anyone with incomes above that amount. Residents who are eligible to apply but have income near the eligibility cap can receive credits less than \$10, some at the top qualify for \$0 in support. Adjustment to the phaseout is important for supporting Missourians who need assistance with increasing housing expenses across our state. Thank you for supporting the housing-related needs of your constituents and fellow Missourians.



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee	e on Tax Reform			
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFORM	ATIONAL PURPOSES
		WITNESS NAME		
INDIVIDUAL:				
WITNESS NAME: SUSAN GIBSON			PHONE NUME	BER:
BUSINESS/ORGANIZATIO	N NAME:		TITLE:	
ADDRESS:				
CITY:			STATE:	ZIP:
EMAIL: Onesuegibson@pr	rotonmail.com	ATTENDANCE: Written	SUBMIT DATE: 3/25/2023 2:05 PM	
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.				



BILL NUMBER: HB 1134				DA <sup>-</sup>	TE: <b>1/2023</b>
COMMITTEE: Special Committee on Tax Reform					
TESTIFYING:	<b>☑</b> IN SUPPORT OF	☐ IN OPPOSITION TO	☐FOR INFO	RMATIC	NAL PURPOSES
	WITNESS NAME				
INDIVIDUAL:					
WITNESS NAME: SUSAN GIBSON			PHONE N	UMBER:	
BUSINESS/ORGANIZATION	ON NAME:		TITLE:		
ADDRESS:					
CITY:			STATE:		ZIP:
EMAIL: Onesuegibson@p	rotonmail.com	ATTENDANCE: Written		IIT DATE: 1/2023 1	2:43 PM
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610, RSMo.					



BILL NUMBER: HB 1134				DATE: <b>4/4/2023</b>
COMMITTEE: Special Committee	e on Tax Reform			
TESTIFYING:	☑IN SUPPORT OF	☐ IN OPPOSITION TO		ATIONAL PURPOSES
		WITNESS NAME		
REGISTERED LO	OBBYIST:			
WITNESS NAME: TOM DEMPSEY			PHONE NUME <b>636-288-7</b>	
REPRESENTING: CATHOLIC CHARI	TIES OF THE ARCHDI	OCESE OF ST. LOUIS	TITLE:	
ADDRESS: 3103 BUCKSKIN PATH				
CITY: ST. CHARLES			STATE: MO	ZIP: <b>63301</b>
EMAIL:		ATTENDANCE:	SUBMIT DATE: 4/4/2023 12:00 AM	
THE INFORMATION ON THIS FORM IS PUBLIC RECORD UNDER CHAPTER 610. RSMo.				