

Are You Eligible For A Lower Tax Bill?

There are a number of exemption programs available in Massachusetts. A tax exemption releases an individual from the requirements to pay all or a portion of the taxes assessed on their personal or real property. The following are just a few of the exemption programs you may be eligible for.

Clause 41 C - Elderly Exemption Requirements:

1. Own & Occupy the Real Estate 5 years
2. Age 70 by July 1st
3. Income from all sources (minus social security allowance) must be less than \$13,000 if single/ \$15,000 if married.
4. Assets must be less than \$28,000 if single; \$30,000 if married.
5. (Value of domicile including up to 3 units of dwelling is exempt.)

Documents:

- | | |
|---|--|
| 1. Birth Certificate (1 ^s time applicant) | 3. Proof of All Assets: bank books, |
| 2. Proof of Income: Pensions, Interest & Dividends, Social Security, Rent, etc. | checking accounts, CD's, 401K's, stocks & bonds, etc |

(Copies of Federal & State Income Tax Returns may be requested to verify income)

Clause 17D Surviving Spouse & Persons over 70 Not Eligible for Clause 41C *

Threshold: Assets cannot exceed \$40,000. (Income is not considered.)

Documents:

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| 1. Death Certificate if surviving spouse | 4. Birth Certificate (1 st application over 70) |
| 2. Amount of mortgage balance | 5. Insurance received, amount & company |
| 3. Assets listed under Clause 41C | 6. Owner/Occupied 10 yrs |

Clause 37A Blind *

Threshold: Must be "Legally" Blind and annually provide a "Certificate of Blindness"

Documents: from the Massachusetts Commission for the Blind.

Clause 22 – Veteran *

Threshold: Must have war time service connected disability of at least 10%

Documents: certified by the VA and be honorably discharged from the service.

All applications must be filed by December 15 or within three months after the actual tax bill is mailed to you, whichever is later. If you want an application form or have any

questions about these or other personal or property tax issues, contact the Board of Assessors at 508.885.7500 extension 121.