

THE COMMONWEALTH OF MASSACHUSETTS

NAME OF CITY OR TOWN

ASSESSORS USE ONLY			
17	41	42	43
DATE RECEIVED			
APPLICATION NO.			
PARCEL ID.			

**SENIOR 70 AND OLDER - SURVIVING SPOUSE - MINOR
FY ____ APPLICATION FOR STATUTORY EXEMPTION**
General Laws Chapter 59, Section 5

THIS APPLICATION IS NOT OPEN
TO PUBLIC INSPECTION
(See General Laws Chapter 59, Section 60.)

Must be filed with Board of Assessors on
or before December 15 or 3 months
after actual (*not* preliminary) tax bills
are mailed for fiscal year if later.

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INSTRUCTIONS: Complete all sections that apply. (Please print or type.)

A. IDENTIFICATION. Complete this section fully.

Name of Applicant _____ Marital Status _____
 Social Security No. _____ (optional) Tel. No. _____
 Legal Residence (Domicile) on July 1, _____
 Mailing Address (If different) _____
 Location of Property _____ No. of Dwelling Units _____
 Did you own the property on July 1, _____ ? Yes No
 If yes, were you
 Sole Owner Co-Owner with Spouse Only Co-Owner with Others?
 Was the property subject to a trust as of July 1, _____ ? Yes No
 (If yes, attach trust instrument including all schedules.)
 Have you been granted any exemption in any other city or town for this year? Yes No
 If yes, name of city or town _____ Amount of exemption \$ _____

DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)

<input type="checkbox"/> Ownership	<input type="checkbox"/> GRANTED	Assessed Tax _____
<input type="checkbox"/> Occupancy	<input type="checkbox"/> DENIED	Exempted Tax _____
<input type="checkbox"/> Status	<input type="checkbox"/> DEEMED DENIED	Adjusted Tax _____
<input type="checkbox"/> Income	Date Voted / Deemed Denied _____	BOARD OF ASSESSORS
	Certificate No. _____	_____
<input type="checkbox"/> Assets	Date Cert. / Notice Sent _____	_____
	Exemption: Clause _____	Date _____

B. EXEMPTION STATUS. Check the status that applies to you and complete the questions that follow.

SURVIVING SPOUSE Deceased Spouse's Name _____
 Date of Death _____
 Have you remarried? Yes No
 If yes, date of remarriage _____

MINOR WITH PARENT DECEASED Deceased Parent's Name _____
 Date of Death _____
 (If first year of application, attach copy of death certificate.)

Are you a surviving spouse or a minor child of a firefighter or a police officer killed in the line of duty?
 Yes No

IF NO, GO ON TO SECTION D.

If yes, and this is the first year of your application, provide circumstances of death.

GO ON TO SECTION E.

PERSON 70 YEARS OLD OR OLDER Date of Birth _____
 (If first year of application, attach copy of birth certificate.)

Have you owned and occupied the property as your domicile for at least 10 years? Yes No

If no, list the other properties you owned and / or occupied during the past 10 years.

Address	Dates	Owned	Occupied
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

GO ON TO SECTION C.

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR.

Complete this section if you are 70 years old or older. Copies of your federal and state income tax returns may be requested to verify your income.

	Applicant and Spouse	Co-Owner(s) and Spouse(s)
Retirement Benefits (Social Security, Railroad, Federal, Mass. and Political Subdivisions)	_____	_____
Other Pensions and Retirement Allowances	_____	_____
Wages, Salaries and other Compensation	_____	_____
Net Profits from Business or Profession	_____	_____
Interest and Dividends	_____	_____
Other Receipts (Rent, Capital Gains, etc.)	_____	_____
TOTALS	_____	_____

GO ON TO SECTION D.

D. VALUE OF PROPERTY OWNED ON JULY 1 THIS YEAR.

Documentation may be requested to verify your assets.

REAL ESTATE:	Assessed Valuation	Amount Due on Mortgage	VALUE
Domicile	_____	_____	_____
Other	_____	_____	_____

PERSONAL ESTATE:

Bank Accounts: Name and Address of Bank	Account No.	
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks, Bonds, Securities, Etc.: Description and Amount

_____	_____
_____	_____

Motor Vehicles and Trailers

Year	Make	Model	
_____	_____	_____	_____
_____	_____	_____	_____

Other Non-Exempt Personal Property

Kind	Description	
_____	_____	_____

TOTAL

GO ON TO SECTION E.

E. SIGNATURE. Sign here to complete the application.

This application has been prepared or examined by me. Under the pains and penalties of perjury, I declare that to the best of my knowledge and belief, it and all accompanying documents and statements are true, correct and complete.

Your signature

Date

If signed by agent, attach copy of written authorization to sign on behalf of taxpayer.

TAXPAYER INFORMATION ABOUT PERSONAL EXEMPTIONS

PERSONAL EXEMPTIONS. You may be eligible to reduce all or a portion of the taxes assessed on your domicile if you meet the qualifications for one of the personal exemptions allowed under Massachusetts law. Qualifications vary, but generally relate to age, ownership, residency, disability, income or assets.

You may be eligible for an exemption if you fall into any of these categories:

- Blind
- Veteran with a service connected disability
- Surviving Spouse
- Minor Child of Deceased Parent
- Senior Citizen age 70 and older.

More detailed information about the qualifications for each exemption may be obtained from your Board of Assessors.

WHO MAY FILE AN APPLICATION. You may file an application if you meet all qualifications for a personal exemption as of July first. You may also apply if you are the administrator or executor of a person who qualified for a personal exemption on July first.

WHEN AND WHERE APPLICATION MUST BE FILED. Your application must be filed with the Board of Assessors by December 15 or 3 months after the actual tax bills were mailed for the fiscal year, whichever is later. THIS DEADLINE CANNOT BE EXTENDED OR WAIVED BY THE ASSESSORS FOR ANY REASON. IF YOUR APPLICATION IS NOT TIMELY FILED, YOU LOSE ALL RIGHTS TO AN EXEMPTION AND THE ASSESSORS CANNOT BY LAW GRANT YOU ONE. AN APPLICATION IS FILED WHEN RECEIVED BY THE ASSESSORS.

PAYMENT OF TAX. Filing an application does not stay the collection of your taxes. In some cases, you must pay the tax when due to appeal the assessors' disposition of your application. Failure to pay the tax when due may also subject you to interest charges and collection action. To avoid any loss of rights or additional charges, you should pay the tax as assessed. If an exemption is granted and you have already paid the entire year's tax as exempted, you will receive a refund of any overpayment.

ASSESSORS DISPOSITION. Upon applying for an exemption, you may be required to provide the assessors with further information and supporting documentation to establish your eligibility. The assessors have 3 months from the date your application is filed to act on it unless you agree in writing before that period expires to extend it for a specific time. If the assessors do not act on your application within the original or extended period, it is deemed denied. You will be notified in writing whether an exemption has been granted or denied.

APPEAL. You may appeal the disposition of your application. The disposition notice will provide you with further information about the appeal procedure and deadline.