

Elderly & Disabled Tax Assistance Committee
Meeting Minutes
April 26, 2023

The meeting of the Elderly & Disabled Tax Assistance Committee was called to order by Grace Keenan, Chair at 5:34 p.m. on Tuesday, April 26, 2023, at Town Hall, 26 Court St., in the Cranberry Meeting Room, located on the 3rd Floor.

PRESENT

Committee Members present:

Grace Keenan, Chair
Patricia Meachen, Vice Chair
Dawn King
John Young

ABSENT

James Sullivan

AGENDA ITEMS

The first item of business was approval of meeting minutes .

- Approval Meeting Minutes from April 12, 2023
 - John Young moved to accept the minutes from April 12, 2023, as amended.
 - Dawn King seconded the motion. The motion carries unanimously.
- Discussion of information for inserts to be mailed with tax bills.

The discussion continued from the previous meeting held on April 12, 2023. There was discussion of what information should be contained on the inserts which are to be mailed in all tax bills. Members presented thoughts and ideas and reviewed the information gathered by James Sullivan from the City of Framingham regarding their tax assistance program.

At our previous meeting there was a question of whether donations are tax deductible. Grace Keenan indicated that she spoke with an auditor from the federal government who indicated donations to the fund were not tax deductible. However, Patricia Meachen researched other communities who indicated the donations are tax deductible, further research needs to be done for a final determination.

It was decided that Patricia Meachen and Pamela Borgatti would draft up an insert to be forwarded to members for review prior to the next meeting on May 10.

In addition, the following criteria for eligibility were recommended.

John Young moved to accept the recommended criteria for eligibility and will have further review and final approval at the next meeting scheduled for May 10.
Patricia Meachen, second. The motion was unanimously approved.

ELDERLY AND DISABLED TAXATION FUND
TAXPAYER INFORMATION

You may be eligible to reduce your Real Estate taxes under the provisions MGL Chapter 60 section 3D, if you meet the requirements listed below.

Qualifications are related to age, ownership, residency, income, and assets. Income and asset verification are required. See attached for all necessary documents required to complete this application.

All applications must be filed annually between August 1st and September 1st.

ALL APPLICANTS-ELDERLY AND/OR DISABLED:

Must own and occupy the property as their domicile.
Must have been a Plymouth resident for more than 5 years.

If Applicant is Single:

Must be 65 years of age as of January 1, 2023
Total household gross income, from all sources, excluding domicile, cannot exceed \$40,000.
Total Estate, excluding domicile, cannot exceed \$100,000.

If Applicant is Married or there are additional household members

One partner needs to be 65 years of age as of January 1, 2023
Total household gross income, from all sources, excluding domicile, cannot exceed \$60,000.
Total estate, excluding domicile, cannot exceed \$150,000.

If Applicant is Disabled:

Must have SSDI or private disability insurance.
Must meet the income and estate requirements as stated above except for the age requirement. Must own and occupy the property as their domicile.

PLEASE PROVIDE COPIES OF BANK STATEMENTS, PENSION STATEMENTS, SOCIAL SECURITY STATEMENTS AND INCOME TAX RETURNS FOR 2022.

Please note: Any resident who receives a tax deferral is not eligible for this program.

John Young moved to adjourn.

Patricia Meachen seconded the motion. The motion to adjourn was unanimously approved.

The meeting concluded at 6:57 p.m.

Respectfully submitted,

Pamela L. Borgatti