



CLAUSE 17E

Requirements:

- A) *Either*, a surviving spouse who owns and occupies the property as their residence. The applicant must have been a surviving spouse on or before July 1<sup>st</sup>,
- B) *Or*, a person 70 years or over who has owned and occupied the property as their residence for at least 5 years. The applicant must have been 70 years old on or before July 1<sup>st</sup>,
- C) *Or*, a minor child of a deceased parent.
- D) Whole estate (not including the value of your home unless it exceeds three dwelling units) cannot exceed: **\$77,859\***

*\*This includes money in the bank, stocks, bonds, automobiles and any other real estate.*

**Documentation Required:**

Birth and/or death certificates, evidence of home ownership and occupancy and in-come tax.

Exemption Amount: **\$393.32**(FY 24) (this amount changes annually)

## CL. 17E GUIDELINES

### DO NOT FILL OUT THE GUIDELINES THIS IS NOT THE APPLICATION

It is the intention of this office to process the applications immediately. Please fill out the application completely and answer every question. If the question does not apply to you, write "NONE" in the space. The following is a guideline to assist you in the filling out of the application.

#### A. IDENTIFICATION: Information requested is standard information.

- Did you own the property on July 1?
- Was the property subject to a TRUST as of July 1? (If so, please attach a copy of the Trust Declaration).

#### B. EXEMPTION STATUS:

- Surviving Spouse: Deceased spouses name, date of death (If first time filing please attach a copy of the death certificate). Have you remarried?
- Minor with Parent Deceased: Deceased parent's name and date of death
- Person 70 or Older: Date of Birth (If first time filing please attach a copy of birth certificate or a copy of passport). Have you owned and occupied the property as your domicile for at least 11 years? If not, list other properties you owned and/or occupied during the past 11 years.

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

THIS SECTION YOU ARE NOT REQUIRED TO FILL OUT, PLEASE GO TO SECTION D.

#### D. VALUE OF ALL PROPERTY OWNED ON JULY 1 OF THIS YEAR:

##### • REAL ESTATE:

Domicile – Assessed Valuation – Amount Due on Mortgage – Value (NOT REQUIRED)

**Other** – If you own any other real estate other than your domicile, you must complete Assessed Valuation, Amount Due on Mortgage and Value of Property. If this does not apply to you, write "NONE"

##### • PERSONAL ESTATE:

Bank Accounts: The name and address of the banks must be filled out. The account number and balance in the bank accounts must be filled out. This includes any bank account you have including checking, savings, credit unions etc.

Stocks, Bonds, Securities, etc.: Description and amount must be filled out. If it does not apply write "NONE".

Motor Vehicles & Trailers: List the year, make and model of any. If this does not apply to you write "NONE".

Other Non-Exempt Personal Property: Other personal property that is not furniture must be described here. IF it does not apply write "NONE".

E. SIGNATURE: The applicant must sign and date the application stating that all the information provided is correct.

***PLEASE NOTE: This application and it's attachments are not public information. This information does not leave the Assessors Office. If at any time while filling out the application you have any questions, please do not hesitate to contact the Assessors Office at 978-674-4200.***