



CLAUSE 41C

Requirements:

- A) Must be at least 65 years old on or before July 1st.
- B) Must have owned *and* occupied the property on July 1st.
- C) Annual Gross receipts (income) cannot exceed:

\$26,634 if single*
\$30,735 if married*

**If over these amounts, but close, please check with the Assessors Office. You may still qualify. The DOR issues an exclusionary amount annually.*

- D) Whole Estate (not including the value of your home unless it exceeds three dwelling units) cannot exceed:

\$54,108 if single**
\$59,164 if married**

***This amount includes all monies in savings and checking accounts, certificate of deposits, etc.*

Documentation Required:

Birth and/or death certificates, evidence of home ownership and occupancy and income* (copies of recent savings, checking & any other financial income statements and tax returns).

Exemption Amount: \$1,000 per year

CL. 41C GUIDELINES

DO NOT FILL OUT GUIDELINES

THIS IS NOT THE APPLICATION; FILL OUT THE ATTACHED APPLICATION

It is the intention of the Assessors Office to process the applications immediately. Please fill out the application completely and answer every question. If the question does not apply, please write "None or N/A", do not leave any questions blank. The following is a guideline to assist you in the filling out of your application:

A. IDENTIFICATION: Information requested is standard information:

- Did you own the property 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:

- Date of Birth – write in the applicants date of birth (If first time filing, attach a copy of a birth certificate or a copy of a current passport)

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

- **Retirement Benefits** (S.S., Railroad, Federal, State) annually or monthly must be filled out. If it does not apply write "NONE".
- **Other Pensions and Retirement Allowances** annually or monthly must be filled out. If it does not apply write "NONE".
- **Wages, Salaries and other Compensations** annually or monthly must be filled out. If it does not apply write "NONE".
- **Net Profits from Business or Profession** annually or monthly must be filled out. If it does not apply write "NONE".
- **Interest & Dividends** annual interest earned on any bank accounts. If it does not apply write "NONE".
- **Other Receipts** (Rent, Capital Gains, Public Assistance, etc.) If it does not apply write "NONE".

TOTALS: Total the amount of income received annually or monthly. Also be sure to include any Co-Owner or spouse sources of income if applicable. If any of the above information is not completed, it may hold up the processing of your application and a questionnaire may follow.

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.