

MEANS TESTED SENIOR EXEMPTION TOWN OF SUDBURY
COMMONWEALTH OF MASSACHUSETTS CHAPTER 169 OF THE ACTS OF 2012 /AMENDED
CHAPTER 10 OF THE ACTS OF 2016

Instructions for Filing:

Fiscal Year 2018 Town of Sudbury
Completed Application and all documentation must be submitted to the Board of Assessors no later than August 31, 2017

Instructions for Filing:
Fiscal Year 2018 Town of Sudbury
MEANS TESTED SENIOR CITIZEN PROPERTY EXEMPTION

Please take a few moments to read this "Instructions for Filing" document, and if anything is unclear to you, or if it prompts any questions or concerns, please contact the Assessor's Office either by phone: 978-639-3395 or by email: gerryc@sudbury.ma.us.

The following documentation must accompany the filing of your application:

1. A complete executed copy of Schedule CB Circuit Breaker Credit 2016 from your Massachusetts State Income Tax Return. **If you did not file a Massachusetts State Income Tax Return for 2016 you must still complete, execute and submit a Schedule CB Circuit Breaker.** If you need a blank Schedule CB Circuit Breaker Credit 2016, please contact our office.
2. A complete executed copy of pages 1 & 2 of your 2016 Federal Income Tax Form 1040.

The completed application along with above mentioned items 1 & 2 must be received in the Assessor's Office: 278 Old Sudbury Rd. Sudbury, MA. 01776. 1st Floor Flynn Building on or before August 31, 2017.

WHEN AND WHERE MUST THE APPLICATION BE FILED? A person who seeks to qualify for property tax relief under the provisions of this exemption shall, before the deadline of August 31, 2017, file an application on the approved form with all supporting documentation of the applicant's income and assets. The application and supporting documentation shall be submitted to the Sudbury Assessor's Office, 278 Old Sudbury Rd. Sudbury, MA. 01776.

THE DEADLINE CANNOT BE EXTENDED OR WAIVED BY THE ASSESSORS FOR ANY REASON. IF THE APPLICATION IS NOT TIMELY FILED OR IS INCOMPLETE BY THE DEADLINE FOR SUBMISSION YOU LOSE ALL RIGHTS TO THIS EXEMPTION AND THE ASSESSORS BY LAW CANNOT GRANT THIS EXEMPTION.

HOW WILL MY EXEMPTION AMOUNT BE DETERMINED? This innovative exemption program is intended to help qualifying seniors reduce their real estate tax burden. In some instances there may be seniors whose tax bill will be reduced to be no more than 10% of their income. We will not know the actual amount you will be paying until all applications have been analyzed and the January 2018 tax bills are calculated.

WHEN SHOULD I EXPECT TO SEE THE REDUCTION IN MY TAX BILL? Filing of the application will not stay the collection of your taxes. Taxes should be paid as assessed, as reflected on your preliminary quarterly tax bills. Should your application meet all requirements of the exemption, your actual FY 2018 tax bill will reflect the valuation reduction caused by implementation of this exemption. In other words, the exemption allowance will be directly applied to your actual tax bill for the year (i.e., the tax bill normally issued January 1st). If that does not happen for any reason, you will be notified.

ASSESSORS APPLICATION REVIEW AND PROCESS

It is important that applicants have an understanding of the application review process, and how their personal information will be treated:

1. The application will be reviewed by the Board of Assessors along with a designated Assessor’s staff member.
2. The pertinent data from the application (i.e. qualifying income, age, assessed value etc.) will be entered on a worksheet. The applicant’s identity will not be detectible on the worksheet. Each application shall be assigned a number. The verified information from the numbered application will be entered on the worksheet to determine eligibility and benefit amount.
3. Those applicants determined to be ineligible will receive written notification as to their ineligibility. The eligible applicant pool is expected to vary from year to year. Eligibility in one year does not guarantee eligibility the following year. Applicants should understand that each year’s qualification is subject to Circuit Breaker eligibility during the prior calendar year. In other words, in order to qualify for the program in FY 2018 the applicant must have met the income criteria of the 2016 Circuit Breaker State Income Tax Credit.
4. The Means Tested Senior Exemption Program (Chapter 169 of the Acts of 2012) is unlike any other property tax exemption/deferral program with which you may be familiar. If you normally file for the Veteran’s, Blind, Surviving Spouse, Senior over the age of 65, Senior Tax Deferral (Clause 41A) etc. do not let the filing of this new application deter you from applying for the traditional programs.

ADDITIONAL PROGRAM NOTES:

<ul style="list-style-type: none"> • A review of financial assets is conducted as part of the application evaluation process. 	<ul style="list-style-type: none"> • Property co-owner (if applicable) must be at least 60 years of age. 	<ul style="list-style-type: none"> • Minimum Sudbury residency requirement of 10 years.
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The Board of Assessors may deny an application if it finds that the applicant has excessive assets that places the applicant and any co-owners outside of the intended recipients of the Exemption.

FY 2018 MEANS TESTED SENIOR EXEMPTION
TOWN OF SUDBURY

APPLICATION FOR EXEMPTION General Court of the
Commonwealth of Massachusetts Chapter 169 Acts of 2012
Chapter 10 of the Acts of 2016

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION
Application Deadline August 31, 2017

OWNER/APPLICANT SECTION

A. Name of Assessed Owner(s): _____

B. Date of Birth:

____/____/____

C. Marital Status:

D. Phone:

E. Legal Residence:

F. Mailing Address if Different:

G. Did you own the property identified
in § E. above on December 31, 2016?

If yes, were you:

Sole Owner _____

Co-owner with spouse only _____

Co-owner with other(s) _____

H. Was the title to the property held in a trust as of December 31, 2016?
If yes, please attach all trust instruments including schedules.

CO-OWNER AGE ELIGIBILITY & RESIDENCY SECTION

I. Were all co-owners at least 60 years of age on or before December 31, 2016? _____

J. If yes, please state the full name and date of birth for all co-owners:

Co-owner 1 Name: _____

Co-owner 1 D.O.B. ____/____/____

Co-owner 2 Name: _____

Co-owner 2 D.O.B. ____/____/____

Co-owner 3 Name: _____

Co-owner 3 D.O.B. ____/____/____

K. Have you or a co-owner owned
and occupied property in
Sudbury as your primary
domicile for at least 10
consecutive years prior to
December 31, 2016?

If no, please tell us the years you have lived
consecutively in Sudbury:

From: _____

Through: _____

REQUIRED DOCUMENTATION

L. The following documentation is required as part of your application and must be submitted by application filing deadline:

- Pages 1 & 2 of 2016 Federal Income Tax 1040, 1040A, 1040 EZ etc.
- 2016 Schedule CB Circuit Breaker
- Trust documentation (if applicable, see § H. above)

Please note: Even if you did not file a Massachusetts State Income Tax Return, you must complete, execute and submit a Schedule CB Circuit Breaker 2016.

ASSETS/VALUE OF PROPERTY OWNED

M. Real Estate (List Below)		
	Assessed Value FY 2017	Amount due on Mortgage(s)
Primary Domicile Address:	\$	\$
Other Real Estate Address(es): _____	\$	\$
_____	\$	\$
Total	\$	\$

N. Personal Property (List Below)		
Bank Accounts:	Total Value of all bank accounts	\$
Stocks, Bonds, Securities:	Total Value of all stock, bonds, securities	\$
Any other personal property including cash value of whole life insurance policies, retirement accounts:	Total Value of other personal property	\$

DEBTS/LIABILITIES

O. Please describe with specificity your debts other than the mortgages listed above, if any:	Amount
	\$
	\$

Signatures

P. BY SIGNING BELOW I REPRESENT THAT TO THE BEST OF MY KNOWLEDGE AND BELIEF, THE INFORMATION CONTAINED IN THIS APPLICATION AND ALL ACCOMPANYING DOCUMENTS AND STATEMENTS ARE TRUE, ACCURATE AND COMPLETE. If signed by agent, attach copy of written authorization to sign on behalf of taxpayer. By the execution hereof, any such agent represents to the best of his/her knowledge after due inquiry, that the information contained in this application and all accompanying documents and statements are true, accurate and complete. Application Deadline: August 31, 2017

Signature of Applicant: _____

Signature of Agent: _____

Date: _____

Print Name: _____