

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

**I. TAX RATE SUMMARY**

la. Total amount to be raised (from page 2, IIe)	\$ 129,580,739.40
lb. Total estimated receipts and other revenue sources (from page 2, IIIe)	24,391,621.00
lc. Tax Levy (Ia minus Ib)	\$ 105,189,118.40
ld. Distribution of Tax Rates and levies	

CLASS	(b) Levy percentage (from LA5)	(c) Ic above times each percent in col (b)	(d) Valuation by class (from LA-5)	(e) Tax Rates (c) / (d) x 1000	(f) Levy by class (d) x (e) / 1000
Residential	90.3264	95,013,543.84	6,528,068,698.00		
Net of Exempt			6,503,347,774.00	14.61	95,013,910.98
Open Space	0.0000	0.00	0.00	0.00	0.00
Commercial	5.3973	5,677,372.29	268,293,396.00	21.16	5,677,088.26
Net of Exempt					
Industrial	0.7866	827,417.61	39,102,700.00	21.16	827,413.13
<b>SUBTOTAL</b>	<b>96.5103</b>		<b>6,835,464,794.00</b>		<b>101,518,412.37</b>
Personal	3.4897	3,670,784.66	173,473,820.00	21.16	3,670,706.03
<b>TOTAL</b>	<b>100.0000</b>		<b>7,008,938,614.00</b>		<b>105,189,118.40</b>

MUST EQUAL 1C

**Signatures**

**Assessors**

**Beth R. Klein, Town Clerk , Sudbury , kleinb@sudbury.ma.us 978-639-3351 | 12/14/2023 11:07 AM**

**Comment:**

**Joshua M Fox, Assessor , Sudbury , assessors@sudbury.ma.us 978-639-3393 | 12/12/2023 10:19 AM**

**Comment:**

**Trevor A. Haydon, Assessor , Sudbury , assessors@sudbury.ma.us 978-639-3393 | 12/13/2023 3:54 PM**

**Comment:**

**Documents**

Documents have been uploaded.

Do Not Write Below This Line --- For Department of Revenue Use Only

**Reviewed By:** Amy Handfield  
**Date:** 12/19/2023  
**Approved:** Andrew Nelson  
**Director of Accounts:** Deborah A. Wagner

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

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A handwritten signature in black ink that reads "Deborah A. Wagner". The signature is written in a cursive style and is centered on a light gray rectangular background.

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

**II. Amounts to be raised**

Ila. Appropriations (col.(b) through col.(g) from page 4)	<b>128,857,073.00</b>
Ilb. Other amounts to be raised	
1. Amounts certified for tax title purposes	<b>0.00</b>
2. Debt and interest charges not included on page 4	0.00
3. Final Awards	0.00
4. Retained Earnings Deficit	0.00
5. Total cherry sheet offsets (see cherry sheet 1-ER)	51,776.00
6. Revenue deficits	0.00
7. Offset receipts deficits Ch. 44, Sec. 53E	0.00
8. CPA other unappropriated/unreserved	<b>0.00</b>
9. Snow and ice deficit Ch. 44, Sec. 31D	0.00
10. Other :	0.00
TOTAL Ilb (Total lines 1 through 10)	<b>51,776.00</b>
Ilc. State and county cherry sheet charges (C.S. 1-EC)	240,638.00
Ild. Allowance for abatements and exemptions (overlay)	431,252.40
Ile. Total amount to be raised (Total Ila through Ild)	<b>129,580,739.40</b>

**III. Estimated receipts and other revenue sources**

IIIa. Estimated receipts - State	
1. Cherry sheet estimated receipts (C.S. 1-ER Total)	7,393,557.00
2. Massachusetts school building authority payments	0.00
TOTAL IIIa	<b>7,393,557.00</b>
IIIb. Estimated receipts - Local	
1. Local receipts not allocated (page 3, col (b) Line 24)	<b>5,300,000.00</b>
2. Offset Receipts (Schedule A-1)	<b>0.00</b>
3. Enterprise Funds (Schedule A-2)	<b>1,096,993.00</b>
4. Community Preservation Funds (See Schedule A-4)	<b>4,002,155.00</b>
TOTAL IIIb	<b>10,399,148.00</b>
IIIc. Revenue sources appropriated for particular purposes	
1. Free cash (page 4, col (c))	<b>5,870,391.00</b>
2. Other available funds (page 4, col (d))	<b>728,525.00</b>
TOTAL IIIc	<b>6,598,916.00</b>
IIId. Other revenue sources appropriated specifically to reduce the tax rate	
1a. Free cash..appropriated on or before June 30, 2023	0.00
1b. Free cash..appropriated on or after July 1, 2023	0.00

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

2.	Municipal light surplus	0.00	
3.	Other source :	0.00	
	TOTAL III d		<b><i>0.00</i></b>
III e.	Total estimated receipts and other revenue sources (Total III a through III d)		<b><i>24,391,621.00</i></b>
<b>IV. Summary of total amount to be raised and total receipts from all sources</b>			
a.	Total amount to be raised (from II e)		<b><i>129,580,739.40</i></b>
b.	Total estimated receipts and other revenue sources (from III e)	<b><i>24,391,621.00</i></b>	
c.	Total real and personal property tax levy (from I c)	<b><i>105,189,118.40</i></b>	
d.	Total receipts from all sources (total IV b plus IV c)		<b><i>129,580,739.40</i></b>

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

LOCAL RECEIPTS NOT ALLOCATED \*

	Receipt Type Description	(a) Actual Receipts Fiscal 2023	(b) Estimated Receipts Fiscal 2024	Percentage Change
==>	1. MOTOR VEHICLE EXCISE	3,958,820.00	3,240,000.00	-18.16
	2. OTHER EXCISE			
==>	a.Meals	354,151.00	290,000.00	-18.11
==>	b.Room	146,217.00	120,000.00	-17.93
==>	c.Other	2,446.00	0.00	-100.00
==>	d.Cannabis	0.00	0.00	0.00
==>	3. PENALTIES AND INTEREST ON TAXES AND EXCISES	397,402.00	211,000.00	-46.91
==>	4. PAYMENTS IN LIEU OF TAXES	51,296.00	41,000.00	-20.07
	5. CHARGES FOR SERVICES - WATER	0.00	0.00	0.00
	6. CHARGES FOR SERVICES - SEWER	0.00	0.00	0.00
	7. CHARGES FOR SERVICES - HOSPITAL	0.00	0.00	0.00
	8. CHARGES FOR SERVICES - SOLID WASTE FEES	0.00	0.00	0.00
	9. OTHER CHARGES FOR SERVICES	0.00	0.00	0.00
	10. FEES	0.00	0.00	0.00
	a.Cannabis Impact Fee	0.00	0.00	0.00
	b.Community Impact Fee Short Term Rentals	0.00	0.00	0.00
	11. RENTALS	587,734.00	511,000.00	-13.06
	12. DEPARTMENTAL REVENUE - SCHOOLS	0.00	0.00	0.00
	13. DEPARTMENTAL REVENUE - LIBRARIES	953.00	0.00	-100.00
	14. DEPARTMENTAL REVENUE - CEMETERIES	0.00	0.00	0.00
	15. DEPARTMENTAL REVENUE - RECREATION	0.00	0.00	0.00
	16. OTHER DEPARTMENTAL REVENUE	210,011.00	140,000.00	-33.34
	17. LICENSES AND PERMITS			
	a.Building Permits	1,103,498.00	478,000.00	-56.68
	b.Other licenses and permits	209,750.00	136,000.00	-35.16
	18. SPECIAL ASSESSMENTS	0.00	0.00	0.00
==>	19. FINES AND FORFEITS	14,923.00	8,000.00	-46.39
==>	20. INVESTMENT INCOME	248,225.00	29,419.00	-88.15
==>	21. MEDICAID REIMBURSEMENT	98,251.00	95,000.00	-3.31
==>	22. MISCELLANEOUS RECURRING	908.00	581.00	-36.01
	23. MISCELLANEOUS NON-RECURRING	8,569.00	0.00	-100.00
	24. <b>Totals</b>	<b>7,393,154.00</b>	<b>5,300,000.00</b>	<b>-28.31</b>

Signatures

**TAX RATE RECAPITULATION**

**Fiscal Year 2024**

**Accounting Officer**

I hereby certify that the actual receipts as shown in column (a) are, to the best of my knowledge correct and complete, and I further certify that I have examined the entries made on page 4 of the above-indicated fiscal year tax rate recapitulation form by the City / Town / District Clerk and hereby acknowledge that such entries correctly reflect the appropriations made and the sources from which such appropriations are to be met.

[Laurie Dellolio, Town Accountant , Sudbury , delloliol@sudbury.ma.us 978-639-3319 | 12/13/2023 3:10 PM](mailto:delloiol@sudbury.ma.us)

**Comment:**

**Documents**

No documents have been uploaded.

\* Do not include receipts in columns (a) or (b) that were voted by the City / Town / District Council or Town Meeting as offset receipts on Schedule A-1, enterprise funds on Schedule A-2, or departmental revolving funds per Chapter 44, Section 53E 1/2. The Recap Page 3 Support form must be submitted to support increases / decreases of estimated receipts to actual receipts.

==> The Recap Page 3 Support form must be submitted to support increases/ decreases of FY 2024 estimated receipts to FY 2023 estimated receipts to be used in calculating the Municipal Revenue Growth Factor (MRGF). The Recap Page 3 Support form must be submitted to list each receipt type included in rows 22 and 23, Miscellaneous Recurring and Non-Recurring.

**TAX RATE RECAPITULATION**  
Fiscal Year 2024

City/Town Council or Town Meeting Dates	FY*	APPROPRIATIONS								AUTHORIZATIONS MEMO ONLY		
		(a) Total Appropriations Of Each Meeting	(b) ** From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)	(g) From Community Preservation Funds (See A-4)	(h) *** Departmental Revolving Funds	(i) Borrowing Authorization (Other)		
05/01/2023	2024	115,512,355.00	114,783,830.00	0.00	728,525.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	728,525.00	728,525.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	328,199.00	0.00	0.00	0.00	0.00	328,199.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	527,280.00	0.00	0.00	0.00	0.00	527,280.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	241,514.00	0.00	0.00	0.00	0.00	241,514.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	150,000.00	0.00	150,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	14,932.00	0.00	14,932.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	144,274.00	144,274.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	250,000.00	250,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/02/2023	2024	438,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	438,000.00	0.00	0.00
05/01/2023	2024	187,744.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	187,744.00	0.00	0.00
05/01/2023	2023	150,000.00	0.00	150,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	279,574.00	0.00	279,574.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	450,000.00	0.00	450,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	160,000.00	0.00	160,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	310,000.00	0.00	310,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	206,652.00	0.00	206,652.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	200,000.00	0.00	200,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/02/2023	2024	1,020,000.00	1,020,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
05/02/2023	2023	200,000.00	0.00	200,000.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00

**TAX RATE RECAPITULATION**  
Fiscal Year 2024

City/Town Council or Town Meeting Dates	FY*	(a) Total Appropriations Of Each Meeting	(b) ** From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)	(g) From Community Preservation Funds (See A-4)	(h) *** Departmental Revolving Funds	(i) Borrowing Authorization (Other)
05/02/2023	2023	400,000.00	0.00	400,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/02/2023	2023	125,000.00	0.00	125,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/02/2023	2023	300,000.00	0.00	300,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	185,000.00	0.00	185,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	210,000.00	0.00	210,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	160,000.00	0.00	160,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	215,000.00	0.00	215,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2023	345,000.00	0.00	345,000.00	0.00	0.00	0.00	0.00	0.00	0.00
05/01/2023	2024	300,000.00	0.00	0.00	0.00	0.00	0.00	300,000.00	0.00	0.00
05/01/2023	2024	480,000.00	0.00	0.00	0.00	0.00	0.00	480,000.00	0.00	0.00
05/02/2023	2024	799,668.00	0.00	0.00	0.00	0.00	0.00	799,668.00	0.00	0.00
05/01/2023	2024	100,000.00	0.00	0.00	0.00	0.00	0.00	100,000.00	0.00	0.00
05/01/2023	2024	23,000.00	0.00	0.00	0.00	0.00	0.00	23,000.00	0.00	0.00
05/01/2023	2024	78,600.00	0.00	0.00	0.00	0.00	0.00	78,600.00	0.00	0.00
05/01/2023	2024	130,000.00	0.00	0.00	0.00	0.00	0.00	130,000.00	0.00	0.00
05/01/2023	2024	292,000.00	0.00	0.00	0.00	0.00	0.00	292,000.00	0.00	0.00
05/01/2023	2024	35,000.00	0.00	0.00	0.00	0.00	0.00	35,000.00	0.00	0.00
05/01/2023	2024	33,000.00	0.00	0.00	0.00	0.00	0.00	33,000.00	0.00	0.00
05/01/2023	2024	1,105,143.00	0.00	0.00	0.00	0.00	0.00	1,105,143.00	0.00	0.00
10/23/2023	2024	86,233.00	0.00	86,233.00	0.00	0.00	0.00	0.00	0.00	0.00
10/23/2023	2024	100,000.00	0.00	100,000.00	0.00	0.00	0.00	0.00	0.00	0.00
10/23/2023	2024	900,000.00	0.00	900,000.00	0.00	0.00	0.00	0.00	0.00	0.00



**TAX RATE RECAPITULATION**  
 Fiscal Year 2024

City/Town Council or Town Meeting Dates	FY*	(a) Total Appropriations Of Each Meeting	(b) ** From Raise and Appropriate	(c) From Free Cash (See B-1)	(d) From Other Available Funds (See B-2)	(e) From Offset Receipts (See A-1)	(f) From Enterprise Funds (See A-2)	(g) From Community Preservation Funds (See A-4)	(h) *** Departmental Revolving Funds	(i) Borrowing Authorization (Other)
10/23/2023	2024	475,000.00	0.00	475,000.00	0.00	0.00	0.00	0.00	0.00	0.00
10/23/2023	2024	248,000.00	0.00	248,000.00	0.00	0.00	0.00	0.00	0.00	0.00
10/23/2023	2024	232,380.00	232,380.00	0.00	0.00	0.00	0.00	0.00	0.00	0.00
<b>Total</b>		<b>128,857,073.00</b>	<b>117,159,009.00</b>	<b>5,870,391.00</b>	<b>728,525.00</b>	<b>0.00</b>	<b>1,096,993.00</b>	<b>4,002,155.00</b>		

\* Enter the fiscal year to which the appropriation relates.  
 \*\* Appropriations included in column (b) must not be reduced by local receipts or any other funding source. Appropriations must be entered gross to avoid a duplication in the use of estimated or other sources of receipts.  
 \*\*\* Include only revolving funds pursuant to Chapter 44, Section 53 E 1/2.

**Clerk**  
 I hereby certify that the appropriations correctly reflect the votes taken by City / Town / District Council.  
**Beth R. Klein, Town Clerk, Sudbury, kleinb@sudbury.ma.us 978-639-3351 | 11/28/2023 4:19 PM**  
 Comment:

**Signatures**  
  
**Documents**  
 No documents have been uploaded.