

Town of Sudbury ~ Finance Committee
Minutes of Meeting
January 19, 2011 – 6:30pm
Lincoln-Sudbury Regional High School – Room A300

Present: Joan Carlton, Jamie Gossels, Bob Jacobson, Bill Kneeland, Marty Ragonas, Jim Rao, and Robert Stein

Absent: Tammie Dufault and Chuck Woodard

Opening Comments

The meeting was opened at 6:39pm

Item 1: Deliberation and Vote – Article 2

Robert Stein discussed the possibility of residents who might have out-of-town properties and millions in assets who might receive this property tax exemption since an asset limit test is not included within the article.

David Levington, co-presenter of the article, stated that he does not feel there is a need for the asset limit. He discussed some of the financial positions of the seniors that he does tax preparations for, and these residents do not have millions worth of assets. He stated that this is a false issue that seems to keep coming up.

Bob Jacobson stated that he agrees with the idea of helping seniors, but he told Ralph Tyler that he thinks the worst thing to happen is for this article to pass tonight and at the ballot. Bob Jacobson opined that he does not believe that the legislature will approve the article as it is worded. His concern is that things will be pushed back by a year or more, as we probably will not have an indication before the May 2011 Annual Town Meeting as to whether or not the legislature has approved the article. If this happens then the earliest the article could be brought forward to the town again is in May 2012. He believes there should be no asset test listed at all within the article.

Robert Stein stated that he does not support the article because it does not include an asset test. Since the seniors are being asked about their income, he does not believe it is too personal to ask about their assets. By not asking for the list of assets, this could cause end up costing the town by unqualified seniors being given the exemption.

Ralph Tyler explained the Clause 18 exemption that is offered, and what kind of information the Assessors can obtain from residents who file for this exemption. He stated that regardless of the way the article is worded, there is always the possibility of someone trying to cheat the system.

Bill Kneeland stated that the article is cleaner if the asset test is taken out. The question shouldn't be concerned about what assets are listed, but what the threshold should be and what we would do with the info. The number of residents that will benefit from the passage of this article out-weighs the one or two residents who might try to cheat the system.

Bob Jacobson stated that the asset test was more important for past articles that were presented since they would have included more people.

Marty Ragonas stated that she is in favor of the article.

VOTED: Motion to recommend the support of Article 2. Motion made by Bob Jacobson and seconded by Marty Ragonas. On vote, motion carries 6 in support, 1 opposed (Stein), and 2 absent (Dufault, Woodard).

There being no further business, the committee adjourned at 7:05pm to participate in the Special Town Meeting.