

FY21 Requirements for Special Act - Senior Exemption Chapter 91

APPLICATION DEADLINE **January 31, 2020** (for FY21)

AGE BY JULY 1, 2019 **65** - Birth Certificate Required First Year

SINGLE PERSON **\$ 47,520** Total Household Income Limit

MARRIED COUPLE **\$ 71,280** Total Household Income Limit

OWNERSHIP

- If property is held in trust, provide copy of trust

HAMILTON RESIDENCY

- Must be legal residence as of 7/1/20
- Principal place of residency
- Hamilton resident minimum 10 consecutive years
- Property owned and occupied by the applicant
6 months plus 1 day each year

TOTAL INCOME DOCUMENTATION FOR ALL HOUSEHOLD MEMBERS

- 2018 Federal & State Tax Returns (including schedules)
- If no returns filed - Social Security Benefit Statement and/or Retirement Statements and any other source of income



TOWN OF HAMILTON - OFFICE OF THE BOARD OF ASSESSORS
P.O. Box 429, Hamilton, Massachusetts 01936
Tel: (978) 468-5574 — Fax: (978) 468-2682

CHAPTER 91 SENIOR EXEMPTION INSTRUCTIONS FOR FISCAL YEAR 2021

APPLICATION IS DUE ON JANUARY 31, 2020

PLEASE RETURN YOUR COMPLETED APPLICATION ALONG WITH THE
FOLLOWING DOCUMENTATION

- COPY OF BIRTH CERTIFICATE, IF THIS IS FIRST TIME APPLICATION.
- SOCIAL SECURITY BENEFIT STATEMENT FOR **2018** (FORM SSA-1099)
- COPY OF **2018** STATE AND FEDERAL INCOME TAX RETURN (INCLUDING SCHEDULES)
- COPIES OF RENT RECEIPTS FOR MULTI-FAMILY HOMES (IF APPLICABLE) ANY OTHER INFORMATION REQUESTED ON THE APPLICATION

ALL INFORMATION PROVIDED IS CONFIDENTIAL

IF PROPERTY IS HELD IN A TRUST INCLUDE A COPY OF THAT TRUST (IF NOT PREVIOUSLY GIVEN TO BOARD OF ASSESSORS OR IF THERE HAVE BEEN ANY CHANGES IN THE TRUST SINCE YOUR LAST APPLICATION) - TRUST MUST BE PROVIDED SHOWING THAT YOU ARE STILL TRUSTEE AND BENEFICIARY OF THAT TRUST.

• **VERY IMPORTANT - PLEASE NOTE:**

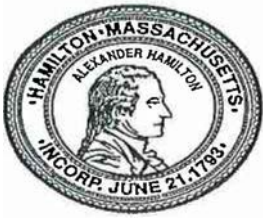
**** FILING THIS APPLICATION DOES NOT STOP THE COLLECTION OF YOUR TAXES. TO AVOID INTEREST AND COLLECTION CHARGES, YOU MUST PAY TAXES AS BILLED BY THE DUE DATE. IF THE EXEMPTION IS GRANTED AND THE TAXES ARE PAID IN FULL, THEN A REFUND WILL BE MADE.**

INCOMPLETE APPLICATIONS CANNOT BE APPROVED AND THEREFORE WILL BE RETURNED TO YOU FOR ADDITIONAL INFORMATION. PLEASE BE SURE APPLICATION IS SIGNED.

WE THANK YOU IN ADVANCE FOR YOUR COOPERATION. PLEASE FEEL FREE TO CALL THE ASSESSORS OFFICE IF YOU NEED HELP FILLING OUT THE APPLICATION.

SINCERELY,

HAMILTON BOARD OF ASSESSORS



THE COMMONWEALTH OF MASSACHUSETTS
TOWN OF HAMILTON
FISCAL YEAR 2021

ASSESSOR
USE ONLY

Parcel ID. _____
Date Received: _____

**FISCAL YEAR 2021 APPLICATION
FOR
CHAPTER 91 SENIOR EXEMPTION**

This application must be submitted to the Hamilton Assessor's Office no later than:
JANUARY 31, 2020

1. IDENTIFICATION: (Complete all sections fully)

Name of Applicant: _____

Mailing Address: _____ Tel. No.: _____

Marital Status: _____

Will you be 65 years or older by **JULY 1, 2020**? Yes _____ No _____
If yes and first year of application, please attach a copy of birth certificate.

Location of Property _____

The above location must be your Legal Residence (Domicile) as of **JULY 1, 2020**.

Is this your Principal Place of Residence? Yes _____ No _____

Have you resided in Hamilton at least 10 consecutive years? Yes _____ No _____

Did you own & occupy the property for at least 6 months + 1 day each year? Yes _____ No _____

If yes, were you: Sole Owner _____ Co-Owner with Spouse Only _____

Co-Owner with Others _____

Is the property subject to a trust? Yes _____ No _____
(If yes, attach instrument including all schedules)

****Filing this application does not stay the collection of your taxes. To avoid interest and collection charges, you must pay taxes as billed by the due date. If the exemption is granted and the taxes are paid in full, then a refund will be made.*

OVER

THE COMMONWEALTH OF MASSACHUSETTS
TOWN OF HAMILTON

ASSESSOR USE ONLY

Parcel I.D.

Date Received:

FISCAL YEAR 2021

2. INCOME

GROSS HOUSEHOLD INCOME FROM ALL SOURCES IN CALENDAR YEAR **2018** FOR EACH MEMBER OF HOUSEHOLD AS FOLLOWS: Retirement Benefits (Social Security, Railroad, Federal, Mass, and Political Subdivisions), Other Pensions and Retirement Allowances, Wages, salaries and Other Compensation, Net Profits from Business or Profession, Tax Exempt Interest and Dividends, Alimony, Child Support, Rental income, Capital gains, Cash Public Assistance, Income from a Partnership or Trust, Returns on Capital reported on Schedule C and excluded income from any other source.

Total number of persons residing in household: _____

Name: First, Middle, Last	Relationship To Applicant	Soc Sec #	Date of Birth	Annual Total Income (All Sources)
	Applicant			
	Spouse			

GROSS HOUSEHOLD INCOME: \$ _____

Did you or any member of your household file a Federal and/or State Tax Return(s) for calendar year **2018**?
Yes _____ No _____

If YES, copies of **2018 Federal/State Tax Returns** are required for all household members.

If NO, please provide us with income documentation (Social Security Statement and any other source of income).

(TAX RETURN INFORMATION WILL BE DESTROYED AFTER FINAL DISPOSITION OF THE APPLICATION)

PLEASE NOTE: INFORMATION ON THIS FORM IS NOT SUBJECT TO PUBLIC INSPECTION.

SIGNATURE: (Sign below to complete application)

This application has been prepared or examined by me. Under the pains and penalties of perjury, I declare that to the best of my knowledge and belief, it and all accompanying documents and statements are true.

Signature(s)

Date

**** Filing this application does not stay the collection of your taxes. To avoid interest and collection charges, you must pay taxes as billed by the due date. If the exemption is granted and the taxes are paid in full, then a refund will be made.*