



Town of Seekonk
Massachusetts
Board of Assessors

PAUL K. BUCKLEY, CHAIRMAN
NELSON ALMEIDA, VICE CHAIRMAN
EDWARD F. MCGOVERN, CLERK

LYDIA A. CORDEIRO, TOWN ASSESSOR

July 1, 2022

RE: FY'23 Senior Exemption Application

Dear Property Owner,

Please fill out and complete the enclosed application, making sure to state your *legal residence* as well as your *property location*.

Once completed, kindly return your signed application, *along with the required paperwork* (listed on the back of the application) to the Assessor's Office as soon as possible.

Applications received by November 1st, 2022 and approved by the Board of Assessors will have the exemption applied to the Fiscal Year 2023 Actual Tax Bill. Please note, the Board of Assessors cannot act upon applications received or post marked after April 3rd, 2023.

Should you have any questions or would like to schedule an appointment for assistance with completing the application, please contact our office at 508-336-2980.

Sincerely,

Lydia A. Cordeiro, Town Assessor

Enclosure: FY'23 Senior Exemption Application

ALL INFORMATION SUPPLIED IS CONFIDENTIAL AND PROTECTED FROM PUBLIC DISCLOSURE.

100 Peck Street, Seekonk, MA 02771

Phone: (508) 336-2980 • Fax: (508) 336-0764 • EMAIL lcordeiro@seekonk-ma.gov

17	41C
Assessors' Use only	
Date Received	
Application No.	
Parcel Id.	

TOWN OF SEEKONK

Name of City or Town

SENIOR
FISCAL YEAR 2023 APPLICATION FOR STATUTORY EXEMPTION
General Laws Chapter 59, § 5

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION
(See General Laws Chapter 59, § 60)

Return to: Board of Assessors

Must be filed with assessors on or before April 1, or 3 months after actual (not preliminary) tax bills are mailed for fiscal year if later. **Due: April 3, 2023**

INSTRUCTIONS: Complete the following. Please print or type.

A. IDENTIFICATION. Complete this section fully.

Name of Applicant _____		Marital Status _____	
Telephone Number _____		Mailing Address (If different) _____	
Legal Residence (Domicile) on July 1, 2022 _____			
No. _____	Street _____	City/Town _____	Zip Code _____
Location of Property: _____		No. of Dwelling Units: 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other _____	
Did you own the property on July 1, 2022? Yes <input type="checkbox"/> No <input type="checkbox"/>			
If yes, were you: Sole Owner <input type="checkbox"/> Co-owner with Spouse Only <input type="checkbox"/> Co-owner with Others <input type="checkbox"/>			
Was the property subject to a trust as of July 1, 2022? Yes <input type="checkbox"/> No <input type="checkbox"/>			
If yes, please attach trust instrument including all schedules.			
Have you been granted any exemption in any other city or town (MA or other) for this year? Yes <input type="checkbox"/> No <input type="checkbox"/>			
If yes, name of city or town _____		Amount exempted \$ _____	

DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)

Ownership <input type="checkbox"/>	GRANTED <input type="checkbox"/>	Assessed Tax \$ _____
Occupancy <input type="checkbox"/>	DENIED <input type="checkbox"/>	Exempted Tax \$ _____
Status <input type="checkbox"/>	DEEMED DENIED <input type="checkbox"/>	Adjusted Tax \$ _____
Income <input type="checkbox"/>		
Assets <input type="checkbox"/>		
Board of Assessors		
Date Voted/Deemed Denied _____		
Certificate No. _____		
Date Cert./Notice Sent _____		
Exemption: Clause _____	Date: _____	

FILING THIS FORM DOES NOT STAY THE COLLECTION OF YOUR TAXES

THIS FORM APPROVED BY THE COMMISSIONER OF REVENUE

B. EXEMPTION STATUS. Complete the questions that follow.

SENIOR 70 OR OLDER (65 or older by local option- See Assessors) Date of Birth _____
If first year of application, attach copy of birth certificate.

Have you owned and occupied the property as your domicile for at least 11 years? Yes No
(6 years if local option under Clause 41C½ adopted - See Assessors)

If no, list the other properties you owned and/or occupied during the past 11 years (6 years if local option under Clause 41C½ adopted - See Assessors.)

Address	Dates	Owned	Occupied
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>
_____	_____	<input type="checkbox"/>	<input type="checkbox"/>

Continue list on attachment in same format as necessary.

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR. Complete this section. Copies of your federal and state income tax return, and other documentation, may be requested to verify your income.

	Applicant & Spouse	Co-owner(s) & Spouse(s)
Retirement Benefits (Social Security, Railroad, Federal, MA & Political Subdivisions)...		
Other Pensions and Retirement Allowances.....		
Wages, Salaries and other Compensation		
Net Profits from Business, Profession or Property Rental.....		
Interest and Dividends.....		
Other Receipts (Capital Gains, Public Assistance, etc.)		
TOTALS		

D. VALUE OF ALL PROPERTY OWNED ON JULY 1 THIS YEAR. Complete this section. Documentation may be requested to verify your assets.

Real Estate	Assessed Valuation	Amount Due on Mortgage	Value
Domicile	_____	_____	_____
Other	_____	_____	_____
Personal Estate			
Bank Accounts: Name & Address of Bank	_____	_____	_____
	_____	_____	_____
Stocks, Bonds, Securities, etc.: Description & Amount	_____	_____	_____
	_____	_____	_____
Motor Vehicles & Trailers: Year, Make & Model	_____	_____	_____
	_____	_____	_____
Other Non-exempt Personal Property: Kind & Description	_____	_____	_____
	_____	_____	_____
		TOTAL	_____

E. SIGNATURE. Sign here to complete the 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, this return and all accompanying documents and statements are true, correct and complete.

Signature

Date

If signed by agent, attach copy of written authorization to sign on behalf of taxpayer.

TAXPAYER INFORMATION ABOUT PERSONAL EXEMPTIONS

PERSONAL EXEMPTIONS. You may be eligible to reduce all or a portion of the taxes assessed on your domicile if you meet the qualifications for one of the personal exemptions allowed under Massachusetts law. Qualifications vary, but generally relate to age, ownership, residency, disability, income or assets.

You may be eligible for an exemption if you fall into any of these categories:

- Legally blind person
- Veteran with a service-connected disability
- Surviving spouse of a servicemember, national guard member or veteran who died from active duty injury or illness
- Surviving spouse
- Minor child of a deceased parent
- Senior citizen age 70 and older (65 and older by local option)

More detailed information about the qualifications for each exemption may be obtained from your board of assessors.

WHO MAY FILE AN APPLICATION. You may file an application if you meet all qualifications for a personal exemption as of July 1. You may also apply if you are the personal representative of the estate, or trustee under the will, of a person who qualified for a personal exemption on July 1.

WHEN AND WHERE APPLICATION MUST BE FILED. Your application must be filed with the assessors on or before April 1, or 3 months after the actual bills were mailed for the fiscal year, whichever is later. An application is filed when (1) received by the assessors on or before the filing deadline, or (2) mailed by United States mail, first class postage prepaid, to the proper address of the assessors, on or before the filing deadline, as shown by a postmark made by the United States Postal Service. **THIS DEADLINE CANNOT BE EXTENDED OR WAIVED BY THE ASSESSORS FOR ANY REASON. IF YOUR APPLICATION IS NOT TIMELY FILED, YOU LOSE ALL RIGHTS TO AN EXEMPTION AND THE ASSESSORS CANNOT BY LAW GRANT YOU ONE.**

PAYMENT OF TAX. Filing an application does not stay the collection of your taxes. In some cases, you must pay all preliminary and actual installments of the tax when due to appeal the assessors' disposition of your application. Failure to pay the tax when due may also subject you to interest charges and collection action. To avoid any loss of rights or additional charges, you should pay the tax as assessed. If an exemption is granted and you have already paid the entire year's tax as exempted, you will receive a refund of any overpayment.

ASSESSORS DISPOSITION. Upon applying for an exemption, you may be required to provide the assessors with further information and supporting documentation to establish your eligibility. The assessors have 3 months from the date your application is filed to act on it unless you agree in writing before that period expires to extend it for a specific time. If the assessors do not act on your application within the original or extended period, it is deemed denied. You will be notified in writing whether an exemption has been granted or denied.

APPEAL. You may appeal the disposition of your application to the Appellate Tax Board, or if applicable, the County Commissioners. The appeal must be filed within 3 months of the date the assessors acted on your application, or the date your application was deemed denied, whichever is applicable. The disposition notice will provide you with further information about the appeal procedure and deadline.

ELDWELY EXEMPTION CLAUSE 41C – 65 YEARS OLD AS OF JULY 1st
EFFECTIVE JULY 1, 2022 FOR FISCAL YEAR 2023

1. **Applicant must have reached his/her 65th birthday prior to July 1st** of the fiscal year for which the exemption is sought.
2. Applicant must have owned and occupied such real estate as his/her **domicile as of July 1st**. Must have been domiciled in the Commonwealth for preceding 10 years and must have owned and occupied said property or other property **in Massachusetts for 5 years**.
3. If property is held in a trust, applicant must have beneficial interest and be a trustee.
4. Applicant's **whole estates (assets)**, excluding assessed value of domicile, as of July 1st in the year of application cannot exceed **\$40,000 if single or \$50,000 for a married couple**.
5. Applicant's **gross receipts (income)**, for the preceding year from all sources, including Social Security cannot exceed **\$20,000 if single or \$30,000 for a married couple**.
With Social Security: \$25,201 if single or \$37,802 for a married couple.
6. Applicant's The Allowable deduction from social security or railroad retirement, etc. for the purpose of computing gross receipts: If single: **\$5,201** If married: **\$7,802**

FISCAL YEAR 2023 DOCUMENTS NEEDED FOR THE CLAUSE 18 EXEMPTION

Please submit to the Assessor's Office the following DOCUMENTS which are REQUIRED to complete your application:

- Birth Certificate (1st year of filing only)
- Copy of **2021** Income Tax Return
- Copy of Trust (required if the property is held in a Trust)

Income & Expenses (for 2021):

1. Social Security Earnings for **2021** (the 1099 Form)
(For a copy of SAA-1099 call 1-800-655-6469 or 1-800-772-1213 at 106 Pleasant St., Attleboro, MA 02703)
2. Pensions received in **2021**
3. Interest and Dividends earned in **2021**
4. Capital Gains
5. Public Assistance Letters (fuel assistance, circuit breaker, food stamps, etc.)
6. Other earned income (wages, rents, etc.)

For Assets: as of June 30, 2022 (excluding the value of the domicile & vehicle(s):

1. **All** bank statements (or books) showing the balances as of **June 30, 2021** for **all** savings, checking, CD's, IRA's, annuities, stocks, bonds, etc.
2. List any other real estate owned inside or outside of Massachusetts, including any other countries.