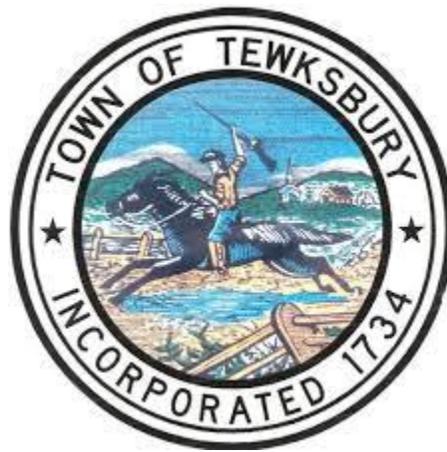


TEWKSBURY TAXATION AID COMMITTEE

Citizens' Taxation Fund

Fiscal Year 2015

Guidelines



All information supplied to the Committee will be held in the strictest of confidence and will not be open for public inspection.

TO: Assessor's Office, Town of Tewksbury, 11 Town Hall Avenue, Tewksbury, MA 01876

(Assessors 978-640-4330)

TEWKSBURY CITIZENS' TAXATION FUND

FISCAL YEAR 2015

APPLICATION GUIDELINES

This fund was established to provide taxation assistance for the elderly and disabled residents of Tewksbury from volunteer contributions of its citizens on their real estate tax forms. The fund was authorized by vote of Annual Town Meeting, October 1, 2002, Article 7 (acceptance of Massachusetts General Law Chapter 60, Section 3D). The eligibility criteria for assistance from this fund, is as follows:

- **Applicant must own and occupy the real estate in Tewksbury as his or her primary domicile.** An applicant must be the titled owner of the property or hold a life estate in the property. If title is held by a trust, the applicant must be both a trustee and at least a 50% beneficiary of the trust in order to qualify. Applicant must also have resided in the Town and held title to the taxed property a full calendar year prior to submission deadline.

- **Applicant must be elderly or disabled.**
 - **“Elderly”** is defined as a person who is at least 59 years of age on or before July 1, 2014.

 - **“Disabled”** is defined as a person who is not able to work due to illness or accident and is currently receiving benefits from one or more of the following programs based on a determination of disability: Social Security Administration, SSI or Medicaid, Veterans Administration, Workers Compensation, or any other such program or agency providing public/financial assistance due to the disability.

- **Applicants must have an income of \$30,000 or less and assets of \$30,000 or less.**

TEWKSBURY CITIZENS' TAXATION FUND

FISCAL YEAR 2015

APPLICATION PROCESS

- Taxation aid assistance will be awarded on an annual basis.
- Application forms are available in the Assessor's Office and on the Town of Tewksbury website (www.tewksbury-ma.gov).
- Applications for Fiscal Year 2015 are due no later than March 31, 2015 and must be accompanied, if filed, by a copy of your entire 2013 Federal Income Tax return, bank statements as of July 1, 2014 and any supporting documents indicating disability benefit receipts.
- Return completed Application to: Assessor's Office, Town of Tewksbury, 11 Town Hall Avenue, Tewksbury, MA 01876.
- We suggest you first avail yourself of the exemptions offered by the Board of Assessors. These include exemptions for Veterans, Elderly, Blind and Widowed Spouse (for complete list and detailed information contact the Board of Assessors). A home owner is NOT eligible for the Tewksbury Elderly and Disabled Tax fund if they are eligible for any of the above exemptions or a Clause 41A Property Tax Deferral. Under no circumstances will the total exemptions combined with the taxation aid assistance exceed the total of your current tax bill.
- All information supplied to the Committee is held in the strictest of confidence and is not open for public inspection.
- In reviewing eligible applications, consideration is given to an applicant's overall financial situation as determined by value of other assets, personal property owned, living expenses and unusual financial hardship.

DISTRIBUTION OF FUNDS

- The funds will be disbursed on a needs basis, as determined by the Committee's application of the eligibility guidelines. Since the fund is replenished annually through voluntary contributions, no set dollar amount can be established for any particular year. If taxation aid assistance is awarded, it will be applied to the Fiscal Year 2015 tax bill and the applicant will be notified by mail.

TEWKSBURY CITIZENS' TAXATION FUND

FISCAL YEAR _____



Complete all sections fully. (Please print or type)

A. IDENTIFICATION

Name of Applicant: _____ Marital Status: _____

Social Security No.: _____ Telephone No.: _____

Location of Property: _____ No. of Dwelling Units: _____

Mailing Address (if different): _____

Do you own the property? _____ Yes _____ No

If yes, are you _____ Sole Owner _____ Co-Owner w Spouse _____ Co-Owner w Others

Was property subject to a Trust? _____ Yes _____ No (If yes, please provide copy of Trust)

Have you been granted any exemption in any other city or town for this year? _____ Yes _____ No

If yes, name of city or town: _____ Amount exempted: _____

B. EXEMPTION STATUS

Date of Birth: _____ (If first year, attach a copy of birth certificate)

Have you owned and occupied the property as your domicile for at least 10 years? _____ Yes _____ No

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR

(Please provide copies of your most recent income tax return, social security statements, pension statements, all W-2 and 1099 statements of earned income, and other receipts, if applicable.)

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

TEWKSBURY CITIZENS' TAXATION FUND

FISCAL YEAR _____



D. VALUE OF ALL PROPERTY OWNED ON JULY 1, this year.

(Please provide copies of all bank statements (Checking, Savings, CD's, IRA's, Stocks, Bonds, Insurance Policies, etc.) covering the period that includes July 1st)

REAL ESTATE:	Assessed Valuation	Amount Due on Mortgage	Value
Domicile:	_____	_____	_____
Other:	_____	_____	_____

PERSONAL ESTATE:

Bank Accounts: Name and Address	Account Numbers	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Stocks, Bonds, Securities, etc: Description	Amount	Value
_____	_____	_____
_____	_____	_____
_____	_____	_____

Motor Vehicles and Trailers	Year	Make	Model	Value
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

Other Non-Exempt Personal Property	Description	Value
_____	_____	_____

TOTAL VALUE: _____ \$ _____

E. SIGNATURE: _____ **DATE:** _____

Under pains and perjury, I declare that to the best of my knowledge, all statements and documents are true.

DISPOSITION OF APPLICATION (ASSESSOR'S USE ONLY)

_____ Ownership	_____ Granted	Amount _____	Committee:
_____ Occupancy	_____ Denied		_____
_____ Status	_____ Deemed Denied		_____
_____ Income			_____
_____ Assets	Date Voted _____		_____
	Certificate No. _____		_____
	Date Cert./Notice Sent _____		_____