

TEWKSBURY TAXATION AID COMMITTEE

Citizens' Taxation Fund

Fiscal Year 2023

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 2023

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, 2022.

 - **“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 2023

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 2023 are due no later than March 31, 2023 and must be accompanied, if filed, by a copy of your entire 2020 Federal Income Tax return, bank statements as of July 1, 2022 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 2023 tax bill and the applicant will be notified by mail.