

## **TAXPAYER INFORMATION CONCERNING THE TOWN OF NORTHBOROUGH ELDERLY AND DISABLED TAXATION FUND**

You may be eligible to receive assistance in paying a portion of the real estate taxes assessed on your residence if you meet the criteria and if adequate funding is available. **Massachusetts General Law, Chapter 60 Section 3D** authorizes voluntary contributions by citizens to a Tax Relief Fund. The purpose of the fund is to provide tax relief for elderly and disabled low-income citizens. The Town of Northborough Elderly and Disabled Taxation Fund Taxation Committee ("The Committee") is responsible for overseeing the Fund and its distribution.

The Committee has adopted the following criteria and procedures in connection with the Fund.

### **APPLICATION PROCEDURE**

Applications may be obtained at the Northborough Senior Center, at Town Hall in the Office of the Assessors, or on the Town's Website via the EDTF Committee's page. Applications must be filed between January 1st and March 1st of each year and returned to the Assessors' Office at the Town Hall. The applications are for the fiscal year in which the application is filed. The fiscal year runs from July 1 to June 30. Applications must be completed in full in order for the Committee to properly review them. **Please direct any questions to (508) 393-5049 or (508)393-5007.**

### **PROCEDURE FOR REVIEW**

Once the application deadline has passed, the Town of Northborough Elderly and Disabled Taxation Fund Committee will review the applications and make decisions as to the disposition of funds. In the review of an application, the Committee shall consider income, age, disability status and an applicant's eligibility for other tax exemptions. The Committee also reserves the right to use discretion regarding applicants with special circumstances and/or undue hardships that hinder their ability to pay their real estate tax obligation.

Applicants must meet the following eligibility requirements:

- 60 years of age or older **OR** have a disability as defined by the ADA – the determination of disability eligibility is at the sole discretion of the Committee.
- Town resident and property owner for at least **(3)** three years
- Annual household income of less than **\$45,180** (individual) and **\$61,320** (total household)
- The assessed value of your home cannot exceed **\$624,468** (average single family home value)

Applicants will also be asked to disclose household assets that shall be considered in the review process. The ability of the Committee to approve applications and grant relief is subject to the availability of funds. Funds awarded by the Committee may be used in conjunction with other Tax Exemption programs offered by the Town **except** the Senior Tax Deferral.

### **NOTIFICATION OF THE APPLICANT**

The Committee shall complete its review of all applications prior to the due date of the fourth quarter tax bill of the fiscal year. The Committee shall notify applicants, in writing, as to the disposition of the application. Awards will be applied by the Collector to the recipient's tax obligation.

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**Applicants are advised that the filing of an application in no way impacts the applicant's obligation to pay their taxes. To preserve the applicant's right to appeal with the Appellate Tax Board, every applicant must make all payments of the tax bill as required by law.**

**All information provided shall remain confidential and will not be used by the Town for any purpose other than to determine eligibility for the Elderly and Disabled Tax Fund.**

**ELDERLY & DISABLED TAXATION FUND**

**TOWN OF NORTHBOROUGH, FISCAL YEAR 2024  
APPLICATION FOR PROPERTY TAX RELIEF  
MASSACHUSETTS GENERAL LAW CHAPTER 60 3D**

**To be eligible for this tax relief:**

- a. You must own and occupy your residence in Northborough for at least the past 3 consecutive years.
- b. You or your spouse must be at least 60 years old by January 1, 2023 *or* have a **disability** as defined by the ADA.
- c. Income cannot exceed **\$45,180** per year for individual or **\$61,320** per year for total household.
- d. The assessed value of your home cannot exceed **\$624,468** (average single family home value)

**INSTRUCTIONS:** Please complete all Sections & submit with these documents to the Assessor or Senior Center.

- 2023 Federal Income Tax Form – all pages
- 2 months' recent bank statements, and proof of other asset values (see below)

Assessors Office: 508-393-5007, Lkeomanivong@town.northborough.ma.us, 63 Main Street

Senior Center Outreach Coordinator: 508-393-5035, jehrhart@town.northborough.ma.us, 119 Bearfoot Road

**Filing As**       Elderly       Disabled (Please provide documentation of disability)

Name of Applicant(s): \_\_\_\_\_

Location of Property: \_\_\_\_\_

Mailing Address (if different): \_\_\_\_\_

How long have you owned the Property?    Years \_\_\_\_\_ Months \_\_\_\_\_

Type of Ownership:     Sole Owner     Co-Owner with Spouse Only     Owner with Life Estate

Co-Owner with Others (list) \_\_\_\_\_

Is the property subject to a trust?     Yes     No      If Yes attach a copy of trust and list of beneficiaries.

Have you been granted any other Real Estate Tax Relief for this year?     Yes     No

If Yes, what was the type of Relief? \_\_\_\_\_ Amount Granted \$ \_\_\_\_\_

**\*\*Relief amounts awarded by the EDTF Committee may be used in conjunction with other Tax Exemption programs offered by the Town except for the Senior Tax Deferral.\*\***

If you are filing as Disabled, please describe the disability as defined by the ADA:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**B. HOUSEHOLD**

Please list all who reside at this address, **including owners**, dependents, and others who live with you.

NAME	AGE	YEARLY INCOME
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

<u>C. ANNUAL HOUSEHOLD INCOME</u>	Applicant	Spouse/Co-Owner(s)	Other Occupants
Social Security Benefits, Gross .....	_____	_____	_____
Pension/Retirement Distribution Income.....	_____	_____	_____
Wages, Salaries and Other Compensation.....	_____	_____	_____
Interest and Dividends.....	_____	_____	_____
Other Receipts (Rent, Capital Gains, etc.).....	_____	_____	_____
<b>TOTAL ANNUAL GROSS INCOME.....</b>	_____	_____	_____

**D. ASSETS**

**REAL ESTATE:**

	Location	Valuation
Residence	_____	_____
Other property	_____	_____

**MORTGAGE OWED:**     Yes     No    \_\_\_\_\_ amount owed

**REVERSE MORTGAGE:**     Yes     No    \_\_\_\_\_ amount available

**EQUITY LINE of CREDIT**     Yes     No    \_\_\_\_\_ amount available

**PERSONAL ESTATE:**

**Bank Accounts:** Name of Bank  
(Attach copies of last 2 months statements)

**Balance**

_____	_____
_____	_____
_____	_____
_____	_____

**Stocks, Bonds, Securities, CD's, IRA's, Annuities**  
**(Attach copies of annual statements)**

**Value**

_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

**TOTAL VALUE**

\_\_\_\_\_

**D. COMMENTS**

Please provide any comments regarding extenuating circumstances or explanations for the Committee to consider:

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**E. SIGNATURE: Sign below 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, it and all accompanying documents and statements are true, correct, and complete.

\_\_\_\_\_  
Your Signature

\_\_\_\_\_  
Date

**OFFICIAL USE**  
**ELDERLY & DISABLED TAXATION FUND COMMITTEE**

Location of Property: \_\_\_\_\_

Parcel Identification: \_\_\_\_\_

Total taxes billed for FY2024: \_\_\_\_\_

Total adjustments to taxes: \_\_\_\_\_

Net taxes billed for FY2024: \_\_\_\_\_

**DISPOSITION OF APPLICATION  
FOR USE BY TAXATION COMMITTEE**

GRANTED

DENIED

RELIEF AMOUNT GRANTED \_\_\_\_\_

Date Voted: \_\_\_\_\_

Date Relief Amount Applied \_\_\_\_\_

**COMMITTEE MEMBERS**

\_\_\_\_\_  
Principal Assessor

\_\_\_\_\_  
Treasurer

\_\_\_\_\_  
Cynthia Moore

\_\_\_\_\_

\_\_\_\_\_



## TOWN OF NORTHBOROUGH

Senior Center  
119 Bearfoot Road  
Northborough, MA 01532  
(508) 393-5035 Phone  
(508) 393-1503 Fax

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March 22, 2024

Dear Resident,

The application you submitted for a property tax exemption, or assistance through the Elderly/Disabled Tax Fund, indicates you may benefit from information about additional programs. As the Outreach Coordinator for the Northborough Senior Center, I am using this opportunity to share some resources and to offer my assistance with this process.

The Low-Income Home Energy Assistance Program (LIHEAP) is a home heating assistance program. For eligible applicants, this program is intended to help with (not fully cover) winter heating expenses. Approved applicants also receive a reduced electric rate. Residents that document their eligibility for LIHEAP can receive a quarterly discount on Northborough DPW water bills.

Other programs that can provide financial relief to eligible persons include the Supplemental Nutrition Assistance Program (SNAP), formerly known as food stamps. Incentive benefits are available to SNAP users that purchase fresh fruits and vegetables from participating farm stands and farmer's markets. SHINE volunteers offer unbiased consultation regarding Medicare insurance coverage. Consultation with a SHINE counselor may improve coverage and save money. SHINE counselors are also knowledgeable about cost saving insurance assistance programs.

Please contact me for more information about these important programs (508-393-5035, [jehrhardt@town.northborough.ma.us](mailto:jehrhardt@town.northborough.ma.us)).

Sincerely,

Jocelyn Ehrhardt