Fiscal Year 2021 Senior Tax Exemption - Clause 41C ½

Senior Tax Exemption Clause 41C ½ is purely 'income-based' and does not consider personal assets. In order to qualify, the applicant will need to prove:

Age – He or she was at least 65 years of age as of July 1, 2020;

Ownership – He or she has owned that property or another property in Massachusetts as a domicile for 5 years;

Domicile – He or she occupied the property on July 1, 2020 and has been domiciled in Massachusetts for the preceding 10 years;

Income – **Combined income of both applicant and spouse** was less than **$60,000** in calendar year 2019;

➢ How to Complete the Application:

1) Fill out Sections A, B, C and D
2) Provide **all** sources of income attributable to the applicant
3) Attach Federal or State Income Tax Return (2019) (if applicable)
4) Sign application (Section D)

CHECK LIST

- ✓ Birth Certificate or License to show proof of age – 65 as of July 1st (1st time filers);
- ✓ Proof of ownership and occupancy of home in Ashland as of July 1st (1st time filers);
- ✓ Proof of ownership and domicile of a property in Mass. the preceding 5 years (1st time filers);
- ✓ Statement of all income sources: IRA accounts, pensions, etc. – must be less than **$60,000;**
- ✓ A copy of State or Federal Income Tax Return (**preferably Federal**) from calendar year 2019 (if filed);
- ✓ Affidavit of not filing taxes (included with the application);

Income information for filing for Fiscal Year 2021 is *calendar year 2019.*

Filing deadline for Fiscal Year 2021 is April 1, 2021.

Submit completed application to:

Assessors Office
101 Main Street
Ashland, MA 01721