



TOWN OF BOURNE

Board of Assessors
24 Perry Avenue
Buzzards Bay, MA 02532
(508) 759-0600 Ext. 1510



Michael Leitzel, Chairperson
Ellen Doyle Sullivan, Clerk
Donna Barakauskas, Member

Rui Pereira, MAA
Director of Assessing

FY2023 REAL ESTATE 17D & 41C EXEMPTIONS

Enclosed is the exemption application for the **Fiscal Year 2023**. This application must be completed and returned to the Assessor's Office by **mail or deposited in the drop box** at 24 Perry Ave, Buzzards Bay, MA 02532 no later than **April 1, 2023**.

***Please do not return this form to the Post Office Box with your tax bill payment. This is a processing center for payments only and the form contains your personal information.**

***If you have any intention of selling your property or it is currently for sale, you must inform the Assessor's office.**

Each applicant **MUST** complete **Section A: Identification**

If you are applying for the **Senior Exemption (41C)** or **Personal Exemption (17D)** you must meet and provide the following:

You must own property as of **July 1, 2022**.

This must be your domicile as of **July 1, 2022**.

You must be age 65 as of **July 1, 2022**.

Bring a copy of your Birth Certificate (**first time only**).

a.) A copy of your Social Security Earnings Statement (1099) for the **2021** calendar year. A married couple needs the gross receipts for each earner. ***Copies of Benefit letters do not contain the information needed.** You may call the Social Security Office in Falmouth at 1-855-881-0212 or Toll Free at 1-800-772-1213 to request this information.

b.) All gross receipts received in calendar year **2021** from pensions, wages, rental and interest income must be documented by the agency from which they are received.

***Eligibility Requirements continued next page**

c.) Copy of **July 1, 2022** statement for all Checking, Savings, Money Market, Stocks, Shares, Bonds, Certificate of Deposits, Treasury note accounts. Letters from the bank will not be accepted.

d.) If you have a **Reverse Mortgage**, please provide a copy of the most recent statement. Money received from a reverse mortgage **does not** count as income.

Financial Requirements for 41C:

Total Income – Section C for 41C only

Such as: Salary, Wages, Social Security, Annuities, Pensions, Rental Income, Interest, Dividends received in the previous year.

Income eligibility cannot exceed the amounts set by the Massachusetts Legislature:

	<u>SINGLE</u>	<u>MARRIED</u>
Per Year:	\$20,000.00	\$30,000.00

- **Assets – Section D for 41C ONLY**

Applicant's estate (excluding the value of your domicile) must not exceed:

	<u>SINGLE</u>	<u>MARRIED</u>
Whole Estate:	\$28,000.00	\$30,000.00

Applicant's estate includes savings, stocks, bonds, real estate (other than your primary residence), etc.

Estate does **NOT** include the value of the applicant's life insurance policy.

If applicant's home has 4 or more residential units or commercial space, a portion of the assessed value of the property will be included in the whole estate.

Exemptions Fiscal Year 2023

1) If you are applying for a **Personal Exemption (17D)** you must be 70 years of age, **or** surviving spouse **or** minor of a deceased parent as of **July 1, 2022**. Total assets cannot exceed \$40,000. Please complete Sections **A, B, D and E** under Surviving Spouse. You must supply documentation of all bank accounts, stocks, bonds, securities etc. These must be documented as of **July 1, 2022**.

***Eligibility Requirements continued next page**

2) There is a **Deferral of Taxes** and a **Hardship Exemption application** also available. You may contact our office for further information.

The actual **Fiscal Year 2023** real estate bill will be issued **December 31, 2022**. Completed applications filed prior to **November 26, 2022** will be reflected on the actual tax bill.

If using the drop box or mail please put the following information on the envelope: **Attn: Assessors**. This will ensure our proper receipt.

Please feel free to contact our office if you have any questions or need any help in completing the application.

Our office number is 508-759-0600 Ext. 1510.
Our hours are Monday – Friday 8:30 a.m. to 4:30 p.m.