

Date Received
Application No.
Parcel Id.

Name of City or Town

SENIORS 65 AND OLDER
FISCAL YEAR APPLICATION FOR PROPERTY TAX DEFERRAL
General Laws Chapter 59, § 5, CLAUSE 41A

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION
(See General Laws Chapter 59, § 60)

Return to: Board of Assessors

Must be filed with assessors on or before April 1, or 3 months
after actual (not preliminary) tax bills are mailed for fiscal year
if later. Tax Deferral and Recovery Agreement
(Form 97-1) must accompany application unless already on
file and persons with interest in property remain the same.

INSTRUCTIONS: Complete all sections fully. Please print or type.

A. IDENTIFICATION.

Name of Applicant:
Telephone Number
Legal residence (domicile) on July 1,
No. Street City/Town Zip Code
Location of property:
Did you own the property on July 1, and for the prior 10 years?
If no, list the other properties you owned and/or occupied during the past 10 years.
Have you been granted any exemption in any other city or town (MA or other) for this year?
Amount of tax you are seeking to defer this year \$

DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)

Ownership
Occupancy
Age
Income
Date Voted/Deemed Denied
Certificate No.
Date Cert./Notice Sent
GRANTED
DENIED
DEEMED DENIED
Assessed Tax
Deferred Tax
Adjusted Tax
Board of Assessors
Date:

FILING THIS FORM DOES NOT STAY THE COLLECTION OF YOUR TAXES

THIS FORM APPROVED BY THE COMMISSIONER OF REVENUE

B. PERSONS WITH INTEREST IN PROPERTY.

Did you own the property on July 1, _____ as
 Sole owner Co-owner with spouse only Co-owner with others?

Was there a mortgage on the property as of July 1, _____? Yes No
 If yes, amount due on mortgage \$ _____ Name of mortgagee(s) _____

Was the property subject to a life estate as of July 1, _____? Yes No
 If yes, name(s) of Remaindermen (person(s) receiving property after your death) _____

Was the property subject to a trust as of July 1, _____ Yes No
 If yes, please attach trust instrument including all schedules.

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR. Copies of your federal and state income tax returns, and other documentation, may be requested to verify your income.

	Applicant & Spouse
Retirement Benefits (Social Security, Railroad, Federal, MA & Political Subdivisions).....	
Other Pensions and Retirement Allowances	
Wages, Salaries and other Compensation.....	
Net Profits from Business, Profession or Property Rental	
Interest and Dividends	
Other Receipts (Capital Gains, Public Assistance, etc.).....	
TOTALS	

D. SIGNATURE. Sign here 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, this return and all accompanying documents and statements are true, correct and complete.

Signature _____ Date _____

If signed by agent, attach copy of written authorization to sign on behalf of taxpayer.

41A – RE TAX DEFERRAL

- age – 65+ as of 7/1/2021
- lived in MA for 10 or more years or occupied for 5 yrs
- income \$40,000 OR less

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- in a trust? is owner trustee? [must be trustee]
 - have a mortgage or HE line or loan? [first thing is to check with bank/mortgage co. to see if they will allow deferred taxes]

if approved:

- lien placed on property
- defer any amount of RE taxes annually
- annual application
- income review
- defer up to 50% of the value [i.e., max of \$150,000 if value is at \$300,000]