

FY2023 REAL ESTATE TAX EXEMPTION AND TAX DEFERRAL DOCUMENTS

PROGRAM	INCOME LIMIT	ASSET LIMIT	TAX DOLLAR BENEFIT FOR TAX YEAR	REQUIREMENTS/ DOCUMENTS	NOTES
AGE 70 +					
SENIOR 17D	NONE	\$73,143	\$641	<ul style="list-style-type: none"> • BIRTH. CERTIFICATE • DEATH CERT. • ASSET DOCUMENTS • OWN/OCC 5 YEARS 	
ELDERLY 41C	<ul style="list-style-type: none"> • SINGLE: \$30,725 • MARRIED: \$46,089 	<ul style="list-style-type: none"> • SINGLE: \$60,958 • MARRIED: \$83,817 	\$2000	<ul style="list-style-type: none"> • BIRTH. CERTIFICATE • DEATH CERT. • ASSET DOCUMENTS • TAX RETURNS • 	
MINOR CHILD, UNDER 18 YRS					
MINOR 17D	NONE	\$73,143	\$641	<ul style="list-style-type: none"> • BIRTH. CERTIFICATE • DEATH CERT. • ASSET DOCUMENTS 	
SURVIVING SPOUSE OF DECEDENT					
SURVIVING SPOUSE 17D	NONE	\$73,143	\$641	<ul style="list-style-type: none"> • BIRTH. CERTIFICATE • DEATH CERT. • ASSET DOCUMENTS 	
VETERAN WITH A SERVICE CONNECTED DISABILITY					
VETERAN 22 22A 22B 22C 22D 22E 22P	NOT APPLICABLE	NOT APPLICABLE	VARIES: \$800 UP TO FULL RE TAX AMOUNT	<ul style="list-style-type: none"> • VETERAN ADMINISTRATION LETTER STATING DISABILITY AND/OR DISABILITY PERCENT- 10% OR MORE 	NEED ANNUAL VA LETTER DATED JULY 1, 2022 OR PRIOR

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BLIND					
BLIND 37	NOT APPLICABLE	NOT APPLICABLE	\$1000	<ul style="list-style-type: none"> ANNUAL LETTER FROM COMMISSION FOR THE BLIND 	NEED ANNUAL CFB LETTER DATED JULY 1, 2022 OR PRIOR
LINE OF DUTY (KIA)					
SERVICE/POLICE 42	NOT APPLICABLE	NOT APPLICABLE	FULL EXEMPTION	<ul style="list-style-type: none"> REPORT FROM CORONER 	
FINANCIAL HARDSHIP					
HARDSHIP 18	NOT APPLICABLE	NOT APPLICABLE	DISCRETIONARY	<ul style="list-style-type: none"> DOCUMENTS RELATING TO FINANCIAL SITUATION 	THIS IS AN OPEN ENDED PROGRAM. AN APPLICANT CAN FILE AN APPLICATION AND THE BOARD DECIDES ON THE MERIT.
DISABILITY BY SOCIAL SECURITY					
DISABILITY	<ul style="list-style-type: none"> SINGLE: \$30,725 MARRIED: \$46,089 	<ul style="list-style-type: none"> SINGLE: \$60,958 MARRIED: \$83,817 	\$2000	<ul style="list-style-type: none"> SS DOCUMENT RELATING TO DISABILITY 	AGE 69 OR <u>YOUNGER</u>

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WESTFORD TAX RELIEF (Means Tested Tax program)					
MEANS TESTED	<ul style="list-style-type: none"> • SINGLE: \$45,750 • MARRIED: \$69,000 	<ul style="list-style-type: none"> • SINGLE: \$112,556 • MARRIED: \$154,764 	VARIES	<ul style="list-style-type: none"> • MA /FED TAX RETURN • BIRTH CERTIFICATE 	AGE 65; OTHER HOUSEHOLD MEMBERS, AGE 60
COMMUNITY PRESERVATION ACT					
CPA	SEE CPA CHART	NONE	VARIES	<ul style="list-style-type: none"> • MA /FED TAX RETURN • BIRTH CERTIFICATE 	NO AGE LIMITS, USES HOUSEHOLD SIZE AND HOUSHOLD INCOMES
TAX DEFERRAL (differs from all other above programs)					
TAX DEFERRAL	<ul style="list-style-type: none"> • \$61,000 SINGLE • \$93,000 MARRIED 	NONE	VARIES	<ul style="list-style-type: none"> • MA /FED TAX RETURN • BIRTH CERTIFICATE- AGE 65+ 	IF THERE IS A LOAN ON PROPERTY, BANK MUST SIGN A SUBORDINATION AGREEMENT. CALL FOR MORE INFORMATION.

FY2023 CPA EXEMPTION INCOME LIMITS

AGE 60 AND OLDER	HOUSEHOLD SIZE	ANNUAL INCOME LIMIT AFTER DEDUCTIONS
	1	\$88,550
	2	\$101,200
	3	\$113,850
	4	\$126,500
	5	\$136,620
	6	\$146,740
	7	\$156,860
	8	\$166,980
UNDER AGE 60	HOUSEHOLD SIZE	ANNUAL INCOME LIMIT AFTER DEDUCTIONS
	1	\$70,840
	2	\$80,960
	3	\$91,080
	4	\$101,200
	5	\$109,296
	6	\$117,392
	7	\$125,488
	8	\$133,584