

## TAX EXEMPTIONS FOR WESTFORD PROPERTY OWNERS

### Could YOU Qualify in 2018?

Generally, you must own and occupy property as a domicile for a minimum of 5 years.  
 Application and all documentation must be received in the Assessors' Office by April 1, 2018, unless noted otherwise.  
 Not all requirements are shown. Contact the Assessors' Office for current details. 978-692-5504

PROGRAM	EXEMPTION AMOUNT	INCOME LIMIT	ASSET LIMIT	REQUIREMENTS	FORMS	REFERENCE
<b>Elderly, Surviving Spouse, Surviving Minor</b>	\$541.38	None	\$63,323	Age 70 or surviving spouse or minor by 7/1/2017	<ul style="list-style-type: none"> <li>• Birth Certificate (1<sup>st</sup> year)</li> <li>• 2016 Federal Income Tax Returns</li> <li>• Death Certificate if surviving spouse or minor (1<sup>st</sup> year)</li> <li>• Proof of asset values as of 7/1/2017 (incl. cars)</li> </ul>	<b>MGL Ch 59 Sec 5</b> Clause 17D
<b>Elderly</b>	\$1000	Single: \$26,935 Married: \$40,403	Single: \$54,097 Married: \$74,382	Age 70 by 7/1/2017 MA resident for 10 yrs.	<ul style="list-style-type: none"> <li>• Birth Certificate (1<sup>st</sup> year)</li> <li>• 2016 Federal Income Tax Returns</li> <li>• Proof of asset values as of 7/1/2017 (incl. cars)</li> </ul>	<b>MGL Ch 59 Sec 5</b> Clause 41C
<b>Veterans</b>	Varies \$800 Minimum	None	None	Min. 10% service-connected disability, MA resident at least 6 mos. prior to service	<ul style="list-style-type: none"> <li>• DD214</li> <li>• Dept. of Veterans Rating Decision and/or % of disability</li> </ul> Contact Town Veterans Agent 978-399-2328 for determining eligibility.	<b>MGL Ch 59 Sec 5</b> Clause 22(a-f), 22A, 22B, 22C, 22D, 22E, Paraleptic
<b>Blind</b>	\$1000	None	None	Must be owner-of-record on 7/1/2017	<ul style="list-style-type: none"> <li>• Physician's letter (1<sup>st</sup> year)</li> <li>• Blind Certificate from Commission thereafter</li> </ul>	<b>MGL Ch 59 Sec 5</b> Clause 37A
<b>Real Estate Tax Deferral</b> [Senior]	Defer tax payments until death or property sale	\$57,000	None	Age 65 by 7/1/2017 MA resident for 10 yrs. Limit: Up to 50% of property value	<ul style="list-style-type: none"> <li>• Birth Certificate (1<sup>st</sup> year)</li> <li>• 2016 Federal Income Tax Returns</li> <li>• Mortgage info (if applicable)</li> </ul> If approved, a lien by the Assessors is recorded.	<b>MGL Ch 59 Sec 5</b> Clause 41A
<b>CPA</b> [Senior or Low Income]	Varies (up to CPA Am't billed)	Varies by age and household size	None	Senior: Age 60  Must own and occupy domicile as of Jan. 1	Birth Certificate if 60+  2016 Federal Income Tax Returns	<b>MGL Ch 44B</b>
<b>TREAD</b> [Tax Relief for Elderly or Disabled]	Varies*	None*	None*	Age 65 or have a MA-recognized disability	Apply by 8/1/2018. Donation-funded program. * Committee determines awards in December based on need and available funds.	<b>MGL Ch 60 Sec 3D</b>
<b>Tax Work Program</b> [Senior or Veteran]	\$1000 (less deductions)	None	None	Age 60 Min: 91 hours of work	Apply by 5/1/2018 at the Senior Center. Only one application per household.	<b>MGL Ch 59 Sec 5</b>