



**TOWN OF ANDOVER FISCAL YEAR 2023 APPLICATION
ANDOVER MEANS TESTED SENIOR TAX EXEMPTION**

This Form Approved by the Andover Board of Assessors

**** ISSUED IN ANTICIPATION OF STATE APPROVAL ****

In order to be eligible for this exemption:

- a. You, or at least one joint applicant, must have owned and occupied a home in Andover as your principal residence for the past 10 consecutive years.
- b. You must have filed a 2021 MA state income tax form Schedule CB.
- c. Applicant must be 65 by December 31, 2021 (joint applicant is at least 60).

THIS APPLICATION MUST BE RECEIVED BY THE ASSESSOR'S OFFICE BY OCTOBER 14, 2022

Incomplete applications will not be processed. Please complete all of the requested information.

1. Name of Applicant(s): _____

Address: _____

City / Town: _____ State: _____ Zip: _____

Home Phone: _____ Cell / Work: _____

2. Applicant's date of birth: _____ Joint applicant's date of birth: _____

- Provide Valid Massachusetts ID: _____ OR Birth Certificate _____

*If you have previously provided these documents, you do NOT need to provide them again.

3. Assessed Valuation (fiscal year 2022): \$ _____ Number of Living Units: _____

4. How long have you owned this property as your domicile? _____

- If less than 10 years, prior property location/s: _____

5. Is the property subject to a trust as of January 1st, 2021? _____. *If yes, please attach trust instrument including all schedules **if not previously submitted or has changed.***

6. Do you own any other real estate? YES / NO If yes, where? _____

7. Have you been granted an exemption in any other city or town? _____ Where? _____

8. Circuit Breaker Income Tax Credit Amount for 2021 MA State Income Filing: \$ _____

Please attach a copy of your 2021 Massachusetts Income Tax Filing and MA CB Schedule.

Subscribed this _____ day of _____ 2022 under the pains and penalties of perjury.

Signature of Applicant: _____

The filing of this application does not stay the collection of your real estate tax obligation. If approved, a credit will be applied to the FY2023 third quarter tax bill which is due February 1, 2023.

BOARD OF ASSESSORS ACTION

APPROVE: _____ EXEMPTION AMOUNT: \$ _____

DENY: _____ Signatures: _____, _____, _____

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APPLICATIONS FOR FY2023

ANDOVER MEANS TESTED SENIOR CITIZENS

PROPERTY TAX EXEMPTION

NOW AVAILABLE

As a result of the efforts of the Elder Services Task Force, a warrant article was passed at the 2018 Annual Town Meeting. This warrant article provided for a local exemption of property taxes for taxpayers who receive the circuit breaker income tax credit when filing the Massachusetts Income Tax. At the 2021 annual Town meeting, this same warrant article, which had a three-year sunset, passed again for a five-year period. We are anticipating State approval for FY2023 and to not delay application submissions, we are commencing with the application process.

WHEN:

This exemption has been implemented as of FY2020. FY2023 will be the fourth year this exemption is available. Amounts exempted will be credited on the February 1, 2023 tax bill. This February 1, 2023 bill is the first actual tax bill for FY2023 and is mailed at the end of **December 2022**.

WHEN TO APPLY:

Applications are now available in the Assessors' Office and the Senior Center. Completed applications are due to the Assessors' office no later than October 14, 2022. This exemption DOES NOT AFFECT TAX BILLS ISSUED PRIOR TO DECEMBER 2022.

TO BE ELIGIBLE:

To qualify for this exemption, you must have owned and occupied your Andover property as your domicile for the last 10 years, be 65 years of age as of December 2021 and receive the circuit breaker Income Tax Credit when you filed your 2021 Massachusetts Income Tax Return. The application to the Assessors' Office will ask you to attach your Massachusetts Income Tax Return along with circuit breaker tax schedule Form CB to verify eligibility and amount of circuit breaker credit received.

EXEMPTION AMOUNT:

The Andover Means Tested Senior Citizen Property Tax Exemption amount is determined annually by the Board of Selectmen. "The board of selectmen shall annually set the exemption amount provided for in this act, provided however, that the amount of the exemption shall be up to a 100 per cent match and not less than a 50 per cent match of the amount of the circuit breaker income tax credit...for which the applicant received in the previous year." The Select Board will hold a meeting in late 2022 to determine the percentage of the circuit breaker credit amount that will be exempted on the FY2023 real estate tax.

QUESTIONS:

If you have any questions relative to this exemption, please call the Andover Assessors' Office at 978-623-8930 M-F 8:30 AM to 4:30 PM or email assessor@andoverma.gov.