



**TOWN OF ANDOVER FISCAL YEAR 2020 APPLICATION
ANDOVER MEANS TESTED SENIOR TAX EXEMPTION**

Form Approved by the Andover Board of Assessors

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 2018 MA state tax form Schedule CB.
- c. Applicant must be 65 by December 31, 2018 (joint applicant is at least 60).

THIS APPLICATION MUST BE RECEIVED BY THE ASSESSOR'S OFFICE BY AUGUST 30, 2019.

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: _____

Please attach a copy of a Valid Massachusetts ID, Driver's License or Birth Certificate

3. Assessed Valuation for fiscal year 2019: \$ _____. No. of units: _____

4. How long have you owned this property? _____

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

5. Is the property subject to a trust as of January 1st, 2018? _____.

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 for FY2020? _____. Where? _____

8. Circuit Breaker Income Tax Credit Amount for 2018 MA State Income Filing: \$ _____

Please attach a copy of your 2018 MA Income Tax Filing and MA CB Schedule

Subscribed this _____ day of _____ 2019 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. A credit or refund will be applied if the exemption is allowed.
BOARD OF ASSESSORS ACTION

APPROVE: _____ EXEMPTION AMOUNT: \$ _____

DENY: _____ Signatures: _____, _____, _____

TOWN OF ANDOVER FISCAL YEAR 2020 APPLICATION ANDOVER MEANS TESTED SENIOR TAX EXEMPTION

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 provides for a local exemption of property taxes for taxpayers who receive the circuit breaker income tax credit when filing the Massachusetts Income Tax. On October 5, 2018, this home rule petition was signed into law. This letter will explain the implementation of the Andover Means Tested Senior Citizens Property Tax Exemption.

WHEN:

This exemption is being implemented for **FY2020**; meaning that it will appear on the February 3, 2020 and May 1, 2020 tax bills. These two tax bills are the actual tax bills for FY2020 and are mailed at the end of **December 2019 and at the end of March 2020**.

WHEN TO APPLY:

Applications will be made available on April 16, 2019 in the Assessors' Office and the Senior Center. Completed applications are due to the Assessors' office no later than August 30, 2019. This exemption DOES NOT AFFECT TAX BILLS ISSUED PRIOR TO DECEMBER 2019.

TO BE ELIGIBLE:

To qualify for this exemption, you must have owned and occupied an Andover property as your domicile for the last 10 years, be 65 years of age as of December 31, 2018 and receive the circuit breaker Income Tax Credit when you file your 2018 Massachusetts State Income Tax Return. The application to the Assessors' Office will ask you to attach your tax returns along with circuit breaker tax schedule Form CB of your Massachusetts State Income Tax return to verify eligibility.

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 percent match and not less than a 50 percent match of the amount of the circuit breaker income tax credit...for which the applicant received in the previous year." The Selectmen will hold a meeting in late 2019 to determine the percentage of the circuit breaker amount that will be exempted on the FY2020 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.