

TRURO TAXATION AID COMMITTEE

Elderly and Disabled Fund

-- Fiscal Year 2021 --

Guidelines

and

Application**

****Must be submitted by Thursday, December 29, 2020**

**All information supplied to the Committee will be held in the strictest of confidence
and not be open for public inspection.**

TO: Town Treasurer, Truro Town Hall, PO Box 2012, Truro, MA 02666-2012

(Town Treasurer 508-349-7004 x114) (10/26/2020)

TRURO ELDERLY AND DISABLED FUND
FISCAL YEAR 2021

APPLICATION GUIDELINES

This fund was established to provide taxation assistance for the elderly and disabled residents of Truro from volunteer contributions of its citizens on their real estate tax bills. The fund was authorized by vote of Annual Town Meeting, April 13, 1999, Article 13 (acceptance of Massachusetts General Law Chapter 60, Section 3D). The eligibility criteria for assistance from this fund is as follows:

- **Applicant must own and occupy the real estate in Truro as his or her primary and sole residence.** An applicant must be the titled owner of the property or hold a life estate in the property. If title is held by a trust, the applicant must be both a trustee and at least a 50% beneficiary of the trust in order to qualify. Applicant must also have resided in the Town and held title to the taxed property a full calendar year prior to submission deadline.

- **Applicant must be elderly or disabled.**

“**Elderly**” is defined as a person who is at least 65 years of age on or before July 1, 2020 for which aid is being requested.

“**Disabled**” is defined as a person who is not able to work due to illness or accident and is currently receiving benefits from one or more of the following programs based on a determination of disability: Social Security Administration, SSI or Medicaid, Veterans Administration, Workers Compensation, or any other such program or agency providing public/financial assistance due to the disability.

- **Total yearly household income, including Social Security, must be less than \$40,000 if single, or less than \$50,000 if married.** If the real estate is owned by more than one person, total household income will be considered.

TRURO ELDERLY AND DISABLED FUND
FISCAL YEAR 2021

APPLICATION PROCESS

- Taxation aid assistance will be awarded on an annual basis.
- Application forms will be available by calling the Town Treasurer's office at 508-214-0922, or the Council on Aging at 508-413-9508 and on the Town of Truro website (www.truro-ma.gov).
- Applications for Fiscal Year 2021 will be due no later than **December 29, 2020**, and must be accompanied, if filed, by a copy of your entire 2019 Federal Income Tax return, Massachusetts Tax return, and any supporting documents indicating disability benefit receipts.
- Return completed Application to: Town Treasurer, Truro Town Hall, PO Box 2012, 24 Town Hall Road, Truro, MA 02666-2012
- We suggest you first avail yourself of the exemptions offered by the Board of Assessors. These include exemptions for Veterans, Elderly, Blind and Widowed Spouse or Children (for complete list and detailed information contact the Board of Assessors). A home owner is **NOT** eligible for the Truro Elderly and Disabled Tax fund if they are eligible for a Clause 41A Property Tax Deferral. Under no circumstances will the total exemptions combined with the taxation aid assistance exceed the total of your current tax bill.
- All information supplied to the Committee will be held in the strictest of confidence and not be open for public inspection.
- In reviewing eligible applications, consideration will also be given to an applicant's overall financial situation as determined by the value of other assets, personal property owned, living expenses and unusual financial hardship.

DISTRIBUTION OF FUNDS

- The funds will be disbursed on a needs basis, as determined by the Committee's application of the eligibility guidelines. Since the fund is replenished annually through voluntary contributions, no set dollar amount can be established for any particular year. If taxation aid assistance is awarded, it will be applied to the Fiscal Year 2021 tax bill and the applicant will be notified by mail.

TRURO ELDERLY AND DISABLED FUND
FISCAL YEAR 2021

APPLICATION

Name _____ Age _____ Marital Status _____

Nature of disability (if applicable)

Address of Property _____ Parcel ID _____ (from tax bill)

Mailing Address _____ Phone No _____

Assessed value of residence (from tax bill)

Years owned _____ Is this your **Primary Residence**? ___ Yes ___ No

Primary Residence is defined on Page 1.

If in Trust, list Trustee(s): _____

A. TOTAL GROSS INCOME (page 4) \$ _____

B. TOTAL ESTIMATED ASSETS (page 4) \$ _____

C. TOTAL ESTIMATED VALUE Personal Property Owned (page 5) \$ _____

D. TOTAL EXPENSES (page 5) \$ _____

Have you applied for, or are you receiving, any other exemptions or financial assistance?

If so, please explain:

Are there any unusual or extraordinary circumstances affecting your financial situation that you wish to have considered with this application? If so, explain on page 6.

DO YOU OWN ANY OTHER REAL ESTATE? ___ Yes ___ No If so, where is it located and what is the assessed value:

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A. INCOME (GROSS)	ANNUAL	COMMENTS
Wages, salary or business revenue:	\$ _____	_____
Social Security	\$ _____	_____
Retirement (Federal, MA & Political Subdivisions)	\$ _____	_____
Workers Compensation, Unemployment:	\$ _____	_____
Disability, Supplemental SSI:	\$ _____	_____
Interest & Dividends:	\$ _____	_____
Other Income: (Rent, IRA's, Trust Income, Annuities, etc.)	\$ _____	_____
Other (please specify): _____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
A. TOTAL GROSS INCOME	\$ _____	_____

B. ESTIMATED ASSETS

Savings, Checking, Money Markets	\$ _____	Total amount
CD, Annuities, IRA's, 401K's	\$ _____	Total amount
Stocks, Bonds	\$ _____	Total amount
Mutual Funds	\$ _____	Total amount
Other investments (please specify) _____	\$ _____	Total amount
_____	\$ _____	Total amount
B. TOTAL ESTIMATED ASSETS	\$ _____	

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C. PERSONAL PROPERTY OWNED	ESTIMATED VALUE	
Vehicles, Boats	\$ _____	
Jewelry, Art	\$ _____	
Antiques, Collections	\$ _____	
Other personal possessions of value	\$ _____	
C. TOTAL ESTIMATED VALUE	\$ _____	
D. EXPENSES	ANNUAL	COMMENTS
Mortgage Payment	\$ _____	
Electric, Heating (gas & oil)	\$ _____	
Phone, Cable	\$ _____	
Food, Clothing	\$ _____	
Car Loans, etc	\$ _____	
Credit Cards	\$ _____	
Medical Bills (including prescription drugs)	\$ _____	
Insurance (Medical, Life)	\$ _____	
Insurance (House, Auto)	\$ _____	
Other (please specify): _____	\$ _____	
_____	\$ _____	
_____	\$ _____	
D. TOTAL EXPENSES	\$ _____	_____

NOTE: If filed, copy of 2019 Federal and State Tax Returns must be submitted with this application.

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Unusual circumstances or additional comments:

CERTIFICATION

I certify that the information I have provided in this application (including supporting documentation) is complete and accurate. I understand that all information is subject to verification. I understand that if approved and the Town of Truro becomes aware of any fraudulent activity related to my application, my assistance will terminate and I will return all funds received to the Town of Truro within 120 days of notification of termination. I authorize the Town of Truro to obtain further information as necessary to complete the application process, verify accuracy of any information provided, or require additional information necessary to determine eligibility.

SIGNATURE(S) _____ DATE _____
(Signed and submitted under the pains and penalties of perjury)

For Taxation Aid Committee Use Only

Taxation Aid Committee Final Action

Date Denied:

Date Granted: _____ Amount: \$