

Town of Mendon Taxation Aid Fund Guidelines and Application FY2023

The fund was established to provide tax assistance for elderly and/or disabled Mendon residents who are homeowners with limited income and assets.

A. ELIGIBILITY

- “Elderly” is here defined as a person who is at least 60 on or before July 1, 2022.
- “Disabled” is defined, for the purposes of this application, as a person who is not able to work. The applicant could be receiving SSI, welfare, or retirement income, or may have suffered a loss of income due to illness or accident.
- An applicant must be the titled owner of the property or hold a life estate in the property. These conditions apply to elderly or disabled applicants.
- Applicants must have lived in Mendon and held title to the taxed property for 5 or more years at the time of the application.
- Income shall include all income such as pensions, interest from savings accounts, IRA’s, stocks or bonds, etc. Gross income limits: Single \$40,000, Couple \$50,000
- Assets, which include stocks, bonds, CDs, IRAs, Annuities, and any tangible liquid asset, will be considered in determining eligibility and aid amount.
- Extraordinary circumstances (e.g., an unusual expense) will be considered in the committee’s deliberations and the decision process. This will provide the committee with flexibility to address unforeseen situations.

B. APPLICATION PROCESS

- Tax aid grants will be awarded annually.
- Applications for FY23 will be **due by October 31, 2022**.

Town of Mendon, MA
Elderly and Disabled Taxation Aid Fund
Application 2022 Fiscal Year

CONFIDENTIAL

Owner(s) of Record

Name: _____ Age: ____ Disabled? Yes No

Name: _____ Age: ____ Disabled? Yes No

Phone # _____ Email _____

Other adult residents in household, if any:

Name: _____ Age ____ Relationship _____

Name: _____ Age ____ Relationship _____

Comments:

Property Address: _____ **Year bought:** _____

Someone from the Committee may contact you if there are any questions.

Current Year Financial Resources and Expenses (continued on 2nd page)

<u>Assets</u>	Amount	Comments
Savings accounts	\$ _____	_____
CDs	\$ _____	_____
IRAs	\$ _____	_____
Stocks, bonds, mutual funds	\$ _____	_____
Other real estate	\$ _____	_____
Other assets (please specify)	\$ _____	_____

<u>Income</u>	<u>Monthly</u>	<u>and/or</u>	<u>Annual</u>
Wages or Salary	\$ _____		\$ _____
Business Income	\$ _____		\$ _____
Pension	\$ _____		\$ _____
Social Security	\$ _____		\$ _____
Disability	\$ _____		\$ _____
Interest/Dividends	\$ _____		\$ _____
Retirement Fund Distributions	\$ _____		\$ _____
Other income	\$ _____		\$ _____

Assistance

Fuel Assistance	\$ _____		\$ _____
SNAP (Food stamps)	\$ _____		\$ _____
Clause 17E or 41D (circle which)	\$ _____		\$ _____

(Real estate tax exemptions through the Board of Assessors)

Tax Deferral	\$ _____		\$ _____
Senior Work-Off Program	\$ _____		\$ _____
Circuit Breaker Credit	\$ _____		\$ _____
Veteran's Exemption	\$ _____		\$ _____
Other Assistance (e.g. Family)	\$ _____		\$ _____

Total Annual Income and Assistance \$ _____

Expenses

Property Taxes	\$ _____		\$ _____
Mortgage	\$ _____		\$ _____
Utilities (Heat, electricity, phone)	\$ _____		\$ _____
Home & Car insurance	\$ _____		\$ _____
Medical insurance	\$ _____		\$ _____
Prescriptions	\$ _____		\$ _____
Other (please specify)	\$ _____		\$ _____

Total Annual Expenses \$ _____

Unexpected expenses:

Signature(s) _____ **Date** _____

_____ **Date** _____

Please attach a copy of your Federal income tax return, and any additional information you would like the Committee to consider.