

BOARD/COMMITTEE NAME: Taxation Aid Committee
DATE OF MEETING: 03-14-2019
TIME OF MEETING: 5:00 pm
LOCATION OF MEETING: Mendon Town Hall, 2nd Floor

Members present/absent:

Alejna Brugos, Jenn Welch, Ken O'Brien, Joyce Gilmore, Kathleen Nicholson

AGENDA ITEMS

1. Call to order: Time: **5:10pm**

2. Clerk's report (approve minutes) – Kathleen read the minutes. vote: Ken made a motion to approve amended meeting minutes from 1-08-2019; Joyce second. Minutes accepted.

3. Treasurer's Report: fund balance, new donations since the last meeting:

Dec 2018 Donation	\$0
2019 Disbursements	\$1000
YTD 2019	\$2,119.50

4. Review and update application form and process for FY2020:

Jenn made a motion to remove the sentence "If title is held by trust, the applicant must be both a trustee and a 50 percent beneficiary of the trust in order to qualify."

Joyce seconds motion.

- Jenn made a motion to remove the sentence "If title is held by trust, the applicant must be both a trustee and a 50 percent beneficiary of the trust in order to qualify." Joyce seconds motion.
- Applications for FY20 will be due by October 28, 2019 – proposed change to due date. Meet first week of November 4-14, 2019: tentative date 11/5/19 to review applications.
- Update to 2018 Federal income tax
- Notification of committee's decisions will be mailed to all applicants by December 31, 2019.
- Application 2020 Fiscal Year: add definition of a few terms such as "Clause 17D or 41D")
- Current Year Financial Resources and Expenses
- Monthly and/or Annual
- Electricity (changed from Power)

Discussed putting new application on website as soon as updated: arbitrary deadline of April 15, 2019.

5. Plans and Next Steps

- Outreach and publicity: add an insert – June 30, 2019 deadline – Joyce makes a motion to add insert with real estate tax: bright pink? Ken seconds. Let's ensure we have address on the flyer. All in favor. Leave copies of fliers in library and other public locations.

6. Other business: COI training

8. Adjourn time: **6:35pm**

Joyce motion to adjourn; Jenn second.