FISCAL YEAR 2023 SENIOR/SURVIVING SPOUSE TAX EXEMPTION

CLAUSE 17D

Senior/Surviving Spouse or Minor Tax Exemption Clause 17D is purely “Asset Based” and does not consider personal income. To qualify, the applicant will need to document:

**AGE:** Applicant is at least 70 years of age as of July 1, 2022

**OR**

**SURVIVING SPOUSE:** Spouse deceased prior to July 1, 2022

**OWNERSHIP:** Surviving Spouse or Minor owns the property in Revere as of July 1, 2022.
Senior owns the property in Revere for not less than five years.

**DOMICILE:** Surviving Spouse or Minor has occupied the property in Revere as of July 1, 2022.
Senior occupies the property in Revere for not less than five years.

**ASSETS:** Assets of applicant is less than $73,105

➤ **HOW TO COMPLETE THE APPLICATION:**

1: Fill out Sections A, B, C and D
2: Document **ALL** sources of Assets attributable to the applicant
3: Attach all supporting documentation

**CHECK LIST**

- Senior - Birth certificate to show proof of age – 70 as of July 1, 2022 (first year only)
- Surviving Spouse – Death certificate of spouse prior to July 1, 2022 (first year only)
- Proof of property ownership as of July 1, 2022 (Assessing records, Deed)
- Proof of occupancy of home in Revere as of July 1, 2022 (Voter registration, 2 utility bills, tax return)
- Statement of all Asset: Examples: Savings, Checking, CD’s, IRA, Money Market, Stocks, Bonds, Motor Vehicle, Other Real Estate and Personal Property.
- 2021 Tax Return
- Trust documents and Affidavit of Trust if home is in a trust
- Completed Application

Submit completed application to: Revere Assessor’s Office
281 Broadway
Revere, MA 02151

Filing deadline for Fiscal Year 2023 is April 3, 2023
CITY OF REVERE

SENIOR 70 AND OLDER - SURVIVING SPOUSE

FY 2023 APPLICATION FOR STATUTORY EXEMPTION

General Laws Chapter 59, Section 5

This application is not open to public inspection (GL Chapter 59, Section 60). It must be filed with the Board of Assessors on or before December 15 or 3 months after actual (not preliminary) tax bills are mailed for Fiscal Year if later. Filing this form does not stay the collection of your taxes.

INSTRUCTIONS: Complete all sections fully. (Please print or type.)

A: IDENTIFICATION.

Name of Applicant: ____________________________ Marital Status: ________________

Social Security No. (optional): ____________________________ Tel No.: ____________________________

Legal Residence (Domicile) on July 1, 2022: ____________________________

Mailing Address (if different): ____________________________

Location of Property: ____________________________ No. of Dwelling Units: ________

Did you own the property on July 1, 2022? _____Yes _____No

If yes, were you ___Sole Owner ___Co-Owner with Spouse only ___Co-Owner with others

Was the Property subject to a trust as of July 1, 2022? _____Yes _____No

(If yes, attach trust instrument including all schedules.)

Have you been granted any exemption in any other city or town for this year? _____Yes _____No

If yes, name of City or Town ____________________________ Amount exempted $__________

B: EXEMPTION STATUS.

Have you owned and occupied the property as your domicile for at least 5 years? _____Yes _____No

If no, list the properties you owned / or occupied during the past 5 years on next page.

Date of Birth: ____________________________

(If first year of application, attach copy of birth certificate)

Please indicate if you are a surviving spouse: ____________

and complete the questions that follow.

Deceased spouse’s name: ____________________________

Date of death: ____________________________

Have you remarried: _____Yes _____No

If yes, date of remarriage: ____________________________

(If first year of application, please attach copy of death certificate)
If necessary, list the properties you owned and / or occupied during the past 5 years.

<table>
<thead>
<tr>
<th>Address</th>
<th>Dates</th>
<th>Owned</th>
<th>Occupied</th>
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C. VALUE OF ALL PROPERTY OWNED ON JULY 1 THIS YEAR
Documentation may be requested to verify your assets.

REAL ESTATE:  
Assessed Valuation | Amount Due on Mortgage VALUE

Domicile | [Number] | [Number] | [Number] |
Other | [Number] | [Number] | [Number] |

PERSONAL ESTATE:

Bank Accounts: Name and Address of Bank (Savings/Checking Accounts, Money Market, CD’s IRA etc)

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<thead>
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<th>Account No.</th>
<th>Amount</th>
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Stocks, Bonds, Securities, Etc.: Description

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Motor Vehicles and Trailers

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<tr>
<th>Year</th>
<th>Make</th>
<th>Model</th>
<th>Amount</th>
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Other Non-Exempt Personal Property

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<thead>
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<th>Kind</th>
<th>Description</th>
<th>Amount</th>
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TOTAL | [Number] |

D. SIGNATURE: sign here to complete the application.
This application has been prepared or examined by me. Under the pains and penalties of perjury, I declare that to the best of my knowledge and belief, it and all accompanying documents are true, correct and complete. I hereby authorize any and all persons, agencies and institutions to release to the Revere Board of Assessors any and all information to verify eligibility for a tax exemption in conjunction with Chapter 59 Section 5 of the Massachusetts General Laws. The information obtained will be kept confidential and will be used only in connection with the application or pending with the Revere Board of Assessors.

Your Signature

If signed by an agent, attach copy of written authorization to sign on behalf of taxpayer.

Date