



APPLICATION DEADLINE – AUGUST 31st EACH YEAR

TOWN OF SHUTESBURY

MEANS TESTED REAL ESTATE EXEMPTION APPLICATION

Contact SHUTESBURY BOARD OF ASSESSORS with Questions: 413.259.3790 / Assessor@shutesbury.org

In order to be eligible for this exemption, the following requirements MUST be met:

1. You, or at least one joint applicant, must have owned and occupied a home in Shutesbury as your principal residence for the last ten (10) consecutive years.
2. You must have filed a Massachusetts State Tax Form Schedule CB (Circuit Breaker) and qualified for a Circuit Breaker credit for the previous calendar year.
3. Primary applicant must be 65 and any joint applicant must be 60 by December 31st of the previous calendar year.

THIS APPLICATION MUST BE RECEIVED IN THE ASSESSORS' OFFICE BY AUGUST 31st Each Year.

Incomplete applications or those missing supporting documentation will not be processed; provide all of the requested information.

1. Name of Applicant(s): _____
 Address: _____
 City/Town: _____ State: _____ Zip: _____
 Mailing Address if different _____
 Home Phone: _____ Cell/Work Phone: _____
 Email Address: _____

2. Applicant Date of Birth: _____ Joint Applicant Date of Birth: ____/____/_____
 Valid Massachusetts ID: _____ Joint Applicant Valid Massachusetts ID: _____

3. Date you purchased your property: ____/____/_____. If less than 10 years ago, also list prior Shutesbury property ownership address and date: _____/_____/_____

4. Is property subject to a trust? _____ *If yes, please attach trust document and all schedules.*

5. Do you own any other real estate? _____ If yes, please provide address(es) and include on assets list on back:

6. Have you been granted any tax exemption in any other city or town? _____ Where? _____

7. Your assets TOTAL as of December 31 of previous year: _____. Use worksheet on back of this application.

8. Provide your MA Circuit Breaker Income Tax Credit amount from the previous calendar year: \$ _____

Please attach a copy of your previous calendar year State Income Tax filing, and the corresponding MA Schedule CB.

Subscribed this _____ day of _____, _____, under the pains and penalties of perjury.

Applicant Signature: _____ Joint Applicant signature: _____

The filing of this application does not stay the collection of your real estate tax obligation. A credit will be applied or a refund issued if the exemption is allowed.

BOARD OF ASSESSORS ACTION for Map/Parcel: ____/____/_____ Date Received: ____/____/_____

APPROVE: _____ EXEMPTION AMOUNT: \$ _____
 DENY: _____ BOARD OF ASSESSORS: _____

COMPLETE LIST OF YOUR ASSETS AS OF DECEMBER 31 OF PREVIOUS YEAR.

For Means-Tested Real Estate Exemption application. NOT open to public inspection.

Please list all assets to which you have legal title and access as sole, joint owner or trustee, that contribute to your total worth, excluding your residence. Assets include: Real estate other than your primary residence, bank checking & savings accounts, and CD's, brokerage and retirement accounts, bonds, money market certificates, stocks, etc., motor vehicles, RV's boats, and trailers.

Other Real

<u>Property Location</u>	<u>Assessed Valuation</u>	<u>Amt. Due on Mortgage</u>	<u>Net Value:</u>
_____	_____	_____	_____
_____	_____	_____	_____

Personal Estate

<u>Bank Accounts: Name & Address of Bank</u>	<u>Value:</u>
_____	_____
_____	_____
_____	_____

<u>Brokerage and Retirement Accounts:</u>	<u>Value:</u>
_____	_____
_____	_____
_____	_____

<u>Motor Vehicles, RV's, Boats & Trailers: Year, Make & Model:</u>	<u>Value:</u>
_____	_____
_____	_____
_____	_____

<u>Other Valuable Personal Property</u>	
<u>Such as fine art, jewelry, etc.: Kind & Description:</u>	<u>Value:</u>
_____	_____
_____	_____
_____	_____
_____	_____
_____	_____

Total Value of Personal Estate: _____

PLEASE DELIVER THIS APPLICATION IN A SEALED ENVELOPE LABELED "FOR SHUTESBURY ASSESSORS ONLY" BY AUGUST 31 EACH YEAR. S