



**TOWN OF SHUTESBURY
APPLICATION FOR SENIOR TAX RELIEF**

GENERAL COURT OF THE COMMONWEALTH OF MASSACHUSETTS
CHAPTER 259 OF THE ACTS OF 2022

EXEMPTION CREDIT: 50% to 200% of Circuit Breaker Credit

DETERMINED BY SELECT BOARD AND
DEPENDENT ON NUMBER OF APPLICANTS

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION

REQUIREMENTS

AGE: 65 OR OLDER (CO-OWNER MUST BE 60 OR OLDER)

RESIDENCY: MUST HAVE BEEN A RESIDENT OF SHUTESBURY FOR 10 CONSECUTIVE YEARS

INCOME: MUST MEET THE STATE CIRCUIT BREAKER LIMITS

ASSETS: MAXIMUM OF \$250,000 EXCLUDING THE RESIDENCE

(ALL ASSETS INCLUDING BANK CHECKING, SAVINGS, BROCKERAGE AND RETIREMENT ACCOUNTS, BONDS, MONEY MARKET CERTIFICATES, STOCKS, ETC. BOATS AND REAL ESTATE OTHER THAN YOUR PRIMARY RESIDENCE)

DOCUMENTATION NEEDED:

PROOF OF AGE

COPY OF Previous Calendar Year FEDERAL INCOME TAX RETURN

COPY OF Previous Calendar Year STATE INCOME TAX RETURN

Including SCHEDULE CB

A COMPLETE LIST OF YOUR ASSETS, VALUATIONS AS OF DECEMBER 31 OF THE PREVIOUS CALENDAR YEAR

COMPLETED APPLICATION

PROPERTY TRUST DOCUMENTATION WITH ALL SCHEDULES, IF APPLICABLE