

# FY2020 STONEHAM TAX EXEMPTIONS

FILING DATES: August 1, 2019 – April 1, 2020

Clause	Age by July 1 of tax year	Residence Requirements	Income	Assets	Exemption Amount
<b>17D – Seniors, Surviving Spouses, Minor Children (of deceased parent)</b>	<p><u>Seniors</u> - 70 +</p> <p><u>Surviving Spouse</u> no age requirement</p> <p><u>Minor</u> – under 18</p>	<ul style="list-style-type: none"> <li>Owned &amp; occupied the property as domicile for any 5 years</li> </ul>	No Limit	Cannot exceed <b>\$63,431</b>	<b>\$278.00</b>
<b>41C – Seniors</b>	65 +	<ul style="list-style-type: none"> <li>Owned &amp; occupied the property as domicile for any 5 years</li> <li>Domiciled in MA for 10 consecutive years before application date</li> </ul>	<p><u>Single</u> - Under <b>\$29,357</b></p> <p><u>Married</u> - Under <b>\$44,053</b></p>	<p><u>Single</u> - Under <b>\$58,714</b></p> <p><u>Married</u> - Under <b>\$80,763</b></p>	<b>\$1,000.00</b>
<b>41A - Seniors Tax Deferral</b>	65 +	<ul style="list-style-type: none"> <li>Owned &amp; occupied the property as domicile for any 5 years</li> <li>Domiciled in MA for 10 consecutive years before application date</li> </ul>	Cannot exceed <b>\$40,000</b> married or single	No Limit	<b>Postpone <u>ANY</u> or <u>ALL</u> taxes until sold or passed away</b>
<b>18 &amp; 18A – Hardship</b>	Any age person having financial difficulties	<ul style="list-style-type: none"> <li>CL18 None</li> <li>CL18A Domiciled in MA for 10 consecutive years before app. date</li> </ul>	No Limit	No Limit	<b>Any</b> This exemption is granted at the Board of Assessors discretion
<b>37A – Blind</b>	No Limit	<ul style="list-style-type: none"> <li>Own &amp; occupy property</li> </ul>	No Limit	No Limit	<b>\$500.00</b> <ul style="list-style-type: none"> <li>Letter from Mass Commission for the Blind</li> </ul>
<b>42 – Surviving Spouse of Police Officer or Firefighter killed in the line of duty</b>	No Limit	<ul style="list-style-type: none"> <li>Own &amp; occupy property</li> </ul>	No Limit	No Limit	<b>Fully Exempt</b>

Clause	Age	Residence Requirements	Income	Assets	Exemption Amount
<b>22, 22A-F Veterans</b> <ul style="list-style-type: none"> <li>▪ 10% or more Disabled</li> <li>▪ Purple Heart</li> <li>▪ Gold Star Parents</li> <li>▪ Surviving Spouse</li> </ul>	No Limit	<ul style="list-style-type: none"> <li>• Domiciled in MA for 6 consecutive months before entering the service</li> </ul> <p><b>OR</b></p> <ul style="list-style-type: none"> <li>• Domiciled in MA for 5 consecutive years</li> </ul>	No Limit	No Limit	<p><b>\$400 –</b></p> <ul style="list-style-type: none"> <li>• 10% to 99% disabled</li> </ul> <p><b>\$1,000</b></p> <ul style="list-style-type: none"> <li>• 100% disabled –with letter from the Dept. of Veterans Affairs each year</li> </ul> <p><b>FULLY EXEMPTED</b></p> <ul style="list-style-type: none"> <li>• Surviving spouses of (1) Active duty personnel (2) Veterans whose death was a result of their injuries or diseases sustained on active duty (3) Soldiers that are missing in action and presumed dead</li> <li>• Paraplegic Veterans</li> <li>• 100% disabled due to service-connected blindness</li> </ul>

**DOCUMENTS NEEDED:**

- **INCOME qualification**, attach a copy of **2018 Tax Return**
- **ASSET qualification**, attach a copy of bank statements (checking & savings), IRA/401k statements, annuities & any other investment vehicles as of **July 1, 2019**
- **VETERANS**, attach DD214 **AND** letter from Department of Veterans Affairs. Can be retrieved at <https://www.ebenefits.va.gov/ebenefits/homepage>
- **BLIND**, attach letter from the Massachusetts Commission for the Blind

**YOU MUST MEET ALL ELIGIBILITY REQUIREMENTS (AGE, DOMICILE, OWNERSHIP, OCCUPANCY, ANNUAL INCOME AND ASSETS) AS OF JULY 1 OF THE TAX YEAR**

***All of the information is confidential and will not be made available to any other department within Town Hall.***