

CPA Surcharge Information

The Community Preservation Act surcharge in Medford is a 1.5% surcharge on your adjusted property tax amount: the surcharge is calculated by first deducting \$100,000 from your assessed value then re-calculating your property tax. Medford voters approved the CPA surcharge on the 2015 citywide ballot and the surcharge was imposed starting in FY2017.

People can be exempt from paying the CPA surcharge if they are eligible homeowners and are also low or moderate income:

Under age of 60 and	Single:	maximum income less than \$ 78,512				
	Married:	"	"	"	"	\$ 89,728
	Family of 3:	"	"	"	"	\$100,944
	Family of 4:	"	"	"	"	\$112,160
60 years old and older	Single:	"	"	"	"	\$ 98,140
	Married:	"	"	"	"	\$112,160
	Family of 3:	"	"	"	"	\$140,200
	Family of 4:	"	"	"	"	\$140,200

For FY2023, homeowner must:

- have owned the property as of January 1, 2022
- be the sole owner, co-owner, life-tenant or trustee with sufficient beneficial interest under terms of trust
- have occupied the property as primary residence as of January 1, 2022
- homeowner and each co-owner must have household income for calendar year 2021 that is at or below the relevant limit (above)
- NOTE: for trust, each co-trustee must meet the income limits