

Dear Applicant for Senior Low-Income exemption (Cl. 41C):

**If you wish to apply, please return this completed and signed application by October 10.**

To qualify, you must own and occupy the property as of July 1, 2025 and meet the ownership requirements that are on the application. Please note: If your home is held in a Trust, then you qualify as the homeowner only if you are a Trustee or Co-Trustee and have sufficient beneficial interest in the home.

**DOCUMENTS TO INCLUDE WITH YOUR APPLICATION:**

1-A copy of pages 1 & 2 of your 2024 Income Tax return and all income schedules (Please call us if you didn't file a 2024 tax return and we will give you an affidavit to sign).

2-Copies of 2 months of all bank statements, IRA account values, investments, other asset accounts etc. (please include all pages of the statements).

Your 2024 Income and Assets had to be below these maximum amounts:

\*Individual Income = BELOW \$32,499

Individual Assets = BELOW \$40,000

\*Married Couple Income = BELOW \$48,751

Married Couple Assets = BELOW \$55,000

Everyone has to re-apply every subsequent year.

*Please note: We are sending you this application as a courtesy. It is your responsibility to remember to apply every year.*

*Thank you, Assessors Dept.- Room 109, City Hall, Medford 781-393-2435*

|                     |    |
|---------------------|----|
| 17                  | 41 |
| Assessors' Use only |    |
| Date Received       |    |
| Application No.     |    |
| Parcel Id.          |    |

MEDFORD

Name of City or Town

**SENIOR**  
**FISCAL YEAR 2026 APPLICATION FOR STATUTORY EXEMPTION**  
**General Laws Chapter 59, § 5**

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION  
(See General Laws Chapter 59, § 60)

**Return to: Board of Assessors**

Must be filed with assessors on or before April 1, or 3 months after actual (not preliminary) tax bills are mailed for fiscal year if later.

**INSTRUCTIONS:** Complete the following. Please print or type.

**A. IDENTIFICATION.** Complete this section fully.

|  |           |                                      |  |
|--|-----------|--------------------------------------|--|
| Name of Applicant _____  |           | Marital Status _____                 |  |
| Telephone Number _____   |           | Mailing Address (if different) _____ |  |
| Legal Residence (Domicile) on July 1, 2025 _____   |           | _____                                |  |
| No. Street   | City/Town | Zip Code                             | No. of Dwelling Units: 1 <input type="checkbox"/> 2 <input type="checkbox"/> 3 <input type="checkbox"/> 4 <input type="checkbox"/> Other _____ |
| Location of Property: _____  |           |                                      |  |
| Did you own the property on July 1, 2025 ? Yes <input type="checkbox"/> No <input type="checkbox"/>  |           |                                      |  |
| If yes, were you: Sole Owner <input type="checkbox"/> Co-owner with Spouse Only <input type="checkbox"/> Co-owner with Others <input type="checkbox"/> |           |                                      |  |
| Was the property subject to a trust as of July 1, 2025 ? Yes <input type="checkbox"/> No <input type="checkbox"/>                                      |           |                                      |  |
| If yes, please attach trust instrument including all schedules.  |           |                                      |  |
| Have you been granted any exemption in any other city or town (MA or other) for this year? Yes <input type="checkbox"/> No <input type="checkbox"/>    |           |                                      |  |
| If yes, name of city or town _____   |           | Amount exempted \$ _____             |  |

**DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)**

|                                    |  |                       |
|------------------------------------|--|-----------------------|
| Ownership <input type="checkbox"/> | GRANTED <input type="checkbox"/>       | Assessed Tax \$ _____ |
| Occupancy <input type="checkbox"/> | DENIED <input type="checkbox"/>        | Exempted Tax \$ _____ |
| Status <input type="checkbox"/>    | DEEMED DENIED <input type="checkbox"/> | Adjusted Tax \$ _____ |
| Income <input type="checkbox"/>    |  |                       |
| Assets <input type="checkbox"/>    |  | Board of Assessors    |
| Date Voted/Deemed Denied _____     |  |                       |
| Certificate No. _____              |  |                       |
| Date Cert./Notice Sent _____       |  |                       |
| Exemption: Clause _____            | Date: _____                            |                       |

FILING THIS FORM DOES NOT STAY THE COLLECTION OF YOUR TAXES

THIS FORM APPROVED BY THE COMMISSIONER OF REVENUE

**B. EXEMPTION STATUS.** Complete the questions that follow.

**SENIOR 70 OR OLDER (65 or older by local option- See Assessors)** Date of Birth \_\_\_\_\_  
*If first year of application, attach copy of birth certificate.*

Have you owned and occupied the property as your domicile for at least 11 years? Yes  No   
 (6 years if local option under Clause 41C½ adopted - See Assessors)

*If no, list the other properties you owned and/or occupied during the past 11 years (6 years if local option under Clause 41C½ adopted - See Assessors.)*

| Address | Dates | Owned                    | Occupied                 |
|---------|-------|--------------------------|--------------------------|
| _____   | _____ | <input type="checkbox"/> | <input type="checkbox"/> |
| _____   | _____ | <input type="checkbox"/> | <input type="checkbox"/> |

*Continue list on attachment in same format as necessary.*

**C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR.** Complete this section. Copies of your federal and state income tax return, and other documentation, may be requested to verify your income.

|  | Applicant & Spouse | Co-owner(s) & Spouse(s) |
|--|--------------------|-------------------------|
| Retirement Benefits (Social Security, Railroad, Federal, MA & Political Subdivisions)... |                    |                         |
| Other Pensions and Retirement Allowances.....  |                    |                         |
| Wages, Salaries and other Compensation .....   |                    |                         |
| Net Profits from Business, Profession or Property Rental.....                            |                    |                         |
| Interest and Dividends.....  |                    |                         |
| Other Receipts (Capital Gains, Public Assistance, etc.) .....                            |                    |                         |
| <b>TOTALS</b>  |                    |                         |

**D. VALUE OF ALL PROPERTY OWNED ON JULY 1 THIS YEAR.** Complete this section. Documentation may be requested to verify your assets.

| Real Estate  | Assessed Valuation | Amount Due on Mortgage | Value |
|--|--------------------|------------------------|-------|
| Domicile _____   |                    |                        |       |
| Other _____  |                    |                        |       |
| <b>Personal Estate</b>                                 |                    |                        |       |
| Bank Accounts: Name & Address of Bank                  |                    |                        |       |
| _____  |                    |                        |       |
| _____  |                    |                        |       |
| Stocks, Bonds, Securities, etc.: Description & Amount  |                    |                        |       |
| _____  |                    |                        |       |
| Motor Vehicles & Trailers: Year, Make & Model          |                    |                        |       |
| _____  |                    |                        |       |
| Other Non-exempt Personal Property: Kind & Description |                    |                        |       |
| _____  |                    |                        |       |
| <b>TOTAL</b>   |                    |                        |       |

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**E. 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, this return and all accompanying documents and statements are true, correct and complete.

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Signature

Date

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

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### TAXPAYER INFORMATION ABOUT PERSONAL EXEMPTIONS

**PERSONAL EXEMPTIONS.** You may be eligible to reduce all or a portion of the taxes assessed on your domicile if you meet the qualifications for one of the personal exemptions allowed under Massachusetts law. Qualifications vary, but generally relate to age, ownership, residency, disability, income or assets.

You may be eligible for an exemption if you fall into any of these categories:

- Legally blind person
- Veteran with a service-connected disability
- Surviving spouse of a servicemember, national guard member or veteran who died from active duty injury or illness
- Surviving spouse
- Minor child of a deceased parent
- Senior citizen age 70 and older (65 and older by local option)

More detailed information about the qualifications for each exemption may be obtained from your board of assessors.

**WHO MAY FILE AN APPLICATION.** You may file an application if you meet all qualifications for a personal exemption as of July 1. You may also apply if you are the personal representative of the estate, or trustee under the will, of a person who qualified for a personal exemption on July 1.

**WHEN AND WHERE APPLICATION MUST BE FILED.** Your application must be filed with the assessors on or before April 1, or 3 months after the actual bills were mailed for the fiscal year, whichever is later. An application is filed when (1) received by the assessors on or before the filing deadline, or (2) mailed by United States mail, first class postage prepaid, to the proper address of the assessors, on or before the filing deadline, as shown by a postmark made by the United States Postal Service. **THIS DEADLINE CANNOT BE EXTENDED OR WAIVED BY THE ASSESSORS FOR ANY REASON. IF YOUR APPLICATION IS NOT TIMELY FILED, YOU LOSE ALL RIGHTS TO AN EXEMPTION AND THE ASSESSORS CANNOT BY LAW GRANT YOU ONE.**

**PAYMENT OF TAX.** Filing an application does not stay the collection of your taxes. In some cases, you must pay all preliminary and actual installments of the tax when due to appeal the assessors' disposition of your application. Failure to pay the tax when due may also subject you to interest charges and collection action. To avoid any loss of rights or additional charges, you should pay the tax as assessed. If an exemption is granted and you have already paid the entire year's tax as exempted, you will receive a refund of any overpayment.

**ASSESSORS DISPOSITION.** Upon applying for an exemption, you may be required to provide the assessors with further information and supporting documentation to establish your eligibility. The assessors have 3 months from the date your application is filed to act on it unless you agree in writing before that period expires to extend it for a specific time. If the assessors do not act on your application within the original or extended period, it is deemed denied. You will be notified in writing whether an exemption has been granted or denied.

**APPEAL.** You may appeal the disposition of your application to the Appellate Tax Board, or if applicable, the County Commissioners. The appeal must be filed within 3 months of the date the assessors acted on your application, or the date your application was deemed denied, whichever is applicable. The disposition notice will provide you with further information about the appeal procedure and deadline.

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