



CLAUSE 41C

Requirements:

- A) Must be at least 65 years old on or before July 1st.
- B) Must have owned *and* occupied the property on July 1st.
- C) Annual Gross receipts (income) cannot exceed:
\$25,008 if single*
\$28,859 if married*

****If over these amounts, but close, please check with the Assessors Office. You may still qualify. The DOR issues an exclusionary amount annually.***

- D) Whole Estate (not including the value of your home unless it exceeds three dwelling units) cannot exceed:
\$50,806 if single**
\$55,553 if married**

*****This amount includes all monies in savings and checking accounts, certificate of deposits, etc.***

Documentation Required:

Birth and/or death certificates, evidence of home ownership and occupancy and income* (copies of recent savings and checking statements and tax returns).

Exemption Amount: \$1,000 per year

CL. 41C GUIDELINES

DO NOT FILL OUT GUIDELINES

THIS IS NOT THE APPLICATION; FILL OUT THE ATTACHED APPLICATION

It is the intention of the Assessors Office to process the applications immediately. Please fill out the application completely and answer every question. If the question does not apply, please write "NONE" in the space. The following is a guideline to assist you in filling out your application:

A. IDENTIFICATION: Information requested is standard information:

- Did you own the property on July 1, ?
- Was the property subject to a trust as of July 1, ? (If a deed was recorded, please attach)

B. EXEMPTION STATUS:

- Date of Birth – write the applicants’ date of birth. (First time filing attach a copy of the birth certificate)

C. GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR

- Retirement Benefits (S.S., Railroad, Federal etc.) – annual or monthly income must be entered. If it does not apply, write "NONE."
- Other Pensions and Retirement Allowances – annual or monthly income must be entered. If it does not apply, write "NONE."
- Wages, Salaries and other Compensation – annual income from working or other sources. If it does not apply, write "NONE."
- Net Profits from Business or Profession – annual income from any business or profession that generates income. If it does not apply, write "NONE."
- Interest and Dividends – annual interest earned on any bank accounts, including savings, checking, etc. If it does not apply, write "NONE."
- Other Receipts (Rent, Capital Gains, etc.) – annual income from any rents received or any other source that generates income. If it does not apply, write "NONE."

TOTALS: Total the amount of income received annually. Also, any Co-owner or spouse sources of income must be filled out. If this information is not filled out, a questionnaire will follow from this office. This will hold up the processing of your application.

D. VALUE OF ALL PROPERTY OWNED ON JULY 1 OF THIS YEAR:

<u>REAL ESTATE:</u>	<u>Assessed Valuation</u>	<u>Amount Due on Mortgage</u>	<u>Value</u>
Domicile	Not Required	Not Required	Not Required
All Other	Required	Required	Required

If you own any property, other than your domicile, you are required to fill out "All other" with the assessed value of the property. If this does not apply, write NONE."

PERSONAL ESTATE:

BANK ACCOUNTS: The name and address of the banks must be filled out. The account number and balance in the bank accounts must be supplied. Any accounts you have must be filled out including checking, savings, credit unions, etc. If the account number or balance is not supplied, you will be sent a questionnaire.

PLEASE NOTE: This application is not public information. This information does not leave this office.

Stocks, Bonds, Securities, Etc.: Description and Amount must be supplied.
If it does not apply, write "NONE."

Motor Vehicles and Trailers: Year, make and model of vehicle.
If it does not apply, write "NONE."

Other Non-Exempt Personal Property: Any personal property that has a value.
(Does not include furniture.)
If it does not apply, write "NONE."

E. SIGNATURE –

The applicant must sign and date the application stating all the information provided is correct.