

# **EASTHAM TAXATION AID COMMITTEE**

## **Eastham Resident Tax Aid Fund**

**-- Fiscal Year 2023 --**

**Guidelines**

**and**

**Application**

**All information supplied to the Committee will be held in the strictest of confidence  
and not be open for public inspection.**

## Eastham Taxation Aid

### APPLICATION GUIDELINES

**This fund was established to provide taxation assistance for the elderly and disabled residents of Eastham from volunteer contributions of its citizens. The fund was authorized by vote of Annual Town Meeting, September 26, 2020, Article 23 (acceptance of Massachusetts General Law Chapter 60, Section 3D). For consideration of assistance from this fund, an applicant must meet the following criteria:**

- **Applicant must own and occupy the real estate in Eastham as his or her primary and sole residence and have continually domiciled in Eastham for 5 years.** An applicant must be the titled owner of the property or hold a life estate in the property. If title is in a trust, the applicant must be both a trustee and at least a 50% beneficiary of the trust in order to qualify.
- **Applicant must be elderly or disabled.**

**“Elderly”** is defined as a person who is at least 55 years of age on or before July 1, 2022.

**“Disabled”** is defined as a person who is not able to work due to illness or accident and is currently receiving benefits from one or more of the following programs based on a determination of disability: Social Security Administration, SSI or Medicaid, Veterans Administration, Workers Compensation, or any other such program or agency providing public/financial assistance due to the disability.

- **Total yearly household income, including Social Security allowance, must be less than \$35,000 if single or less than \$45,000 if married.** If the real estate is owned by more than one person, total household income will be considered.

## Eastham Taxation Aid

### APPLICATION PROCESS

- Taxation aid assistance will be awarded on an annual basis.
- Application forms will be available at Eastham Town Hall, Eastham Public Library, Eastham Council on Aging, Eastham Food Pantry, Eastham Post Offices, Lower Cape Outreach in Orleans and on the Town of Eastham website ([www.eastham-ma.gov](http://www.eastham-ma.gov)).
- Applications for Fiscal Year 2023 will be due no later than **August 1, 2022**, and must be accompanied, if filed, by a copy of your entire 2021 Federal Income Tax return, Massachusetts Tax return, and any supporting documents indicating disability benefit receipts.
- Return completed Application to: Town Treasurer/Collector. Eastham Town Hall, 2500 State Highway, Eastham, MA 02642
- We suggest you first avail yourself of the exemptions offered by the Board of Assessors. These include exemptions for Veterans, Elderly and Blind. For detailed information, contact the Assessor's office. A homeowner is **NOT** eligible for the Eastham Elderly and Disabled Tax fund if they are deferring their taxes. Under no circumstances will the total exemptions combined with the taxation aid assistance exceed the total of your current tax bill.
- All information supplied to the Committee will be held in the strictest of confidence and not be open for public inspection.
- In reviewing eligible applications, consideration will also be given to an applicant's overall financial situation as determined by the value of other assets, personal property owned, living expenses and unusual financial hardship.

### DISTRIBUTION OF FUNDS

- The funds will be disbursed on a needs basis, as determined by the Committee's application of the eligibility guidelines. Since the fund is replenished annually through voluntary contributions, no set dollar amount can be established for any particular year. If taxation aid assistance is awarded, it will be applied to the Fiscal Year 2023 tax bill and the applicant will be notified by mail.

**Eastham Taxation Aid FY2023**

**APPLICATION**

Name \_\_\_\_\_ Age \_\_\_\_\_ Marital Status \_\_\_\_\_

Nature of disability (if applicable) \_\_\_\_\_

Address of Property \_\_\_\_\_ Parcel ID \_\_\_\_\_

Mailing Address \_\_\_\_\_ Phone No \_\_\_\_\_

Assessed value of residence \_\_\_\_\_

Years owned \_\_\_\_\_ Is this your **Primary Residence**? \_\_\_\_\_ Yes \_\_\_\_\_ No

**Primary Residence** is defined on Page 1.

If in Trust, list Trustee(s): \_\_\_\_\_

**A. TOTAL GROSS INCOME (page 4)** \$ \_\_\_\_\_

**B. TOTAL ESTIMATED ASSETS (page 4)** \$ \_\_\_\_\_

**C. TOTAL ESTIMATED VALUE Personal Property Owned (page 5)** \$ \_\_\_\_\_

**D. TOTAL EXPENSES (page 5)** \$ \_\_\_\_\_

Have you applied for, or are you receiving, any other exemptions or financial assistance?

If so, please explain: \_\_\_\_\_

\_\_\_\_\_

Are there any unusual or extraordinary circumstances affecting your financial situation that you wish to have considered with this application? If so, explain on page 6.

DO YOU OWN ANY OTHER REAL ESTATE? \_\_\_\_\_ If so, where is it located and what is the assessed value?

\_\_\_\_\_

\_\_\_\_\_

**Eastham Taxation Aid FY2023**

<b>A. INCOME (GROSS)</b>	<b>ANNUAL</b>	<b>COMMENTS</b>
Wages, salary or business revenue:	\$ _____	_____
Social Security	\$ _____	_____
Retirement Income	\$ _____	_____
Workers Compensation, Unemployment:	\$ _____	_____
Disability, Supplemental SSI:	\$ _____	_____
Interest & Dividends:	\$ _____	_____
Other Income: (Rent, IRA's, Trust Income, Annuities, etc.)	\$ _____	_____
Other (please specify): _____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
<b>A. TOTAL GROSS INCOME</b>	\$ <u>_____</u>	<u>_____</u>

**B. ESTIMATED ASSETS**

Savings, Checking, Money Markets	\$ _____ Total amount
CD, Annuities, IRA's, 401K's	\$ _____ Total amount
Stocks, Bonds, precious metals or	
Crypto-currency	\$ _____ Total amount
Mutual Funds	\$ _____ Total amount
Other investments (please specify)	
_____	\$ _____ Total amount
_____	\$ _____ Total amount

**B. TOTAL ESTIMATED ASSETS**      \$ \_\_\_\_\_

**Eastham Taxation Aid FY2023**

<b>C. PERSONAL PROPERTY OWNED</b>	<b>ESTIMATED VALUE</b>	
Vehicles, Boats	\$ _____	
Jewelry, Art Antiques, Collections	\$ _____	
Other personal possessions of value	\$ _____	
<b>C. TOTAL ESTIMATED VALUE</b>	<b>\$ _____</b>	
<b>D. EXPENSES</b>	<b>ANNUAL</b>	<b>COMMENTS</b>
Mortgage Payment	\$ _____	_____
Electric, Heating (gas & oil)	\$ _____	_____
Car Loans, etc.	\$ _____	_____
Credit Cards	\$ _____	_____
Medical Bills (including prescription drugs)	\$ _____	_____
Insurance (Medical, Life)	\$ _____	_____
Insurance (House, Auto)	\$ _____	_____
Other (please specify): _____	\$ _____	_____
_____	\$ _____	_____
_____	\$ _____	_____
<b>D. TOTAL EXPENSES</b>	<b>\$ _____</b>	<b>_____</b>

**NOTE: If filed, a copy of 2021 Federal and State Tax Returns must be submitted with this application.**

**Eastham Taxation Aid FY2023**

Unusual circumstances or additional comments:

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**CERTIFICATION**

I certify that the information I have provided in this application (including supporting documentation) is complete and accurate. I understand that all information is subject to verification. I understand that if approved and the Town of Eastham becomes aware of any fraudulent activity related to my application, my assistance will terminate and I will return all funds received to the Town of Eastham within 120 days of notification of termination. I authorize the Town of Eastham to obtain further information as necessary to complete the application process, verify accuracy of any information provided, or require additional information necessary to determine eligibility.

SIGNATURE(S) \_\_\_\_\_ DATE \_\_\_\_\_  
(Signed and submitted under the pains and penalties of perjury)

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For Taxation Aid Committee Use Only

**Taxation Aid Committee Final Action**

Date Denied: \_\_\_\_\_

Date Granted: \_\_\_\_\_ Amount: \$ \_\_\_\_\_