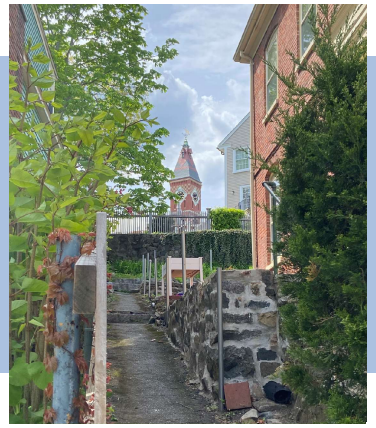
Tax Assistance Information Session

October 29, 2026, from 12:30 to 2:30 PM

Jacobi Community Center
10 Humphrey St.



Marblehead Means-Tested Senior Property Tax Program

12:30 *Welcome*

Overview & Updates

Application (Eligibility / Examples / Explainers)

Timeline

Q&A

2:30 *Adjourn*

Program Overview

- Marblehead's **Means-Tested Senior Property Tax Exemption** is a highly targeted property tax relief program, which has been carefully designed to assist our unique demographics and safeguard our limited municipal resources.
- The exemption supplements state-funded tax relief programs, like the Circuit Breaker credit, when those programs are insufficient in protecting our long-time senior residents from rising property taxes.
- Like the state Circuit Breaker program, our program aims to keep property tax obligations, when added to half of annual water and sewer costs, from exceeding 10 percent of eligible seniors' income.
- Our municipal program, which is funded and managed solely by the town, differs from the state Circuit Breaker program in a few crucial ways; it is:
  - A property tax exemption, not an income tax credit.
  - Available only to homeowners, not to renters.
  - A supplement to, not a replacement of, state tax relief benefits.

Program Overview

- **What it IS…**
  - Highly targeted property tax relief to seniors who need it most.
  - Available to Marblehead's seniors only AFTER they receive the maximum state Senior Circuit Breaker credit, and their property taxes are STILL a disproportionate share of their income.
  - A significant new responsibility for our Assessor department.



- **What it ISN'T…**
  - A broad tax exemption available to all Marblehead seniors.
  - A redistribution of property taxes to favor one demographic group over another.

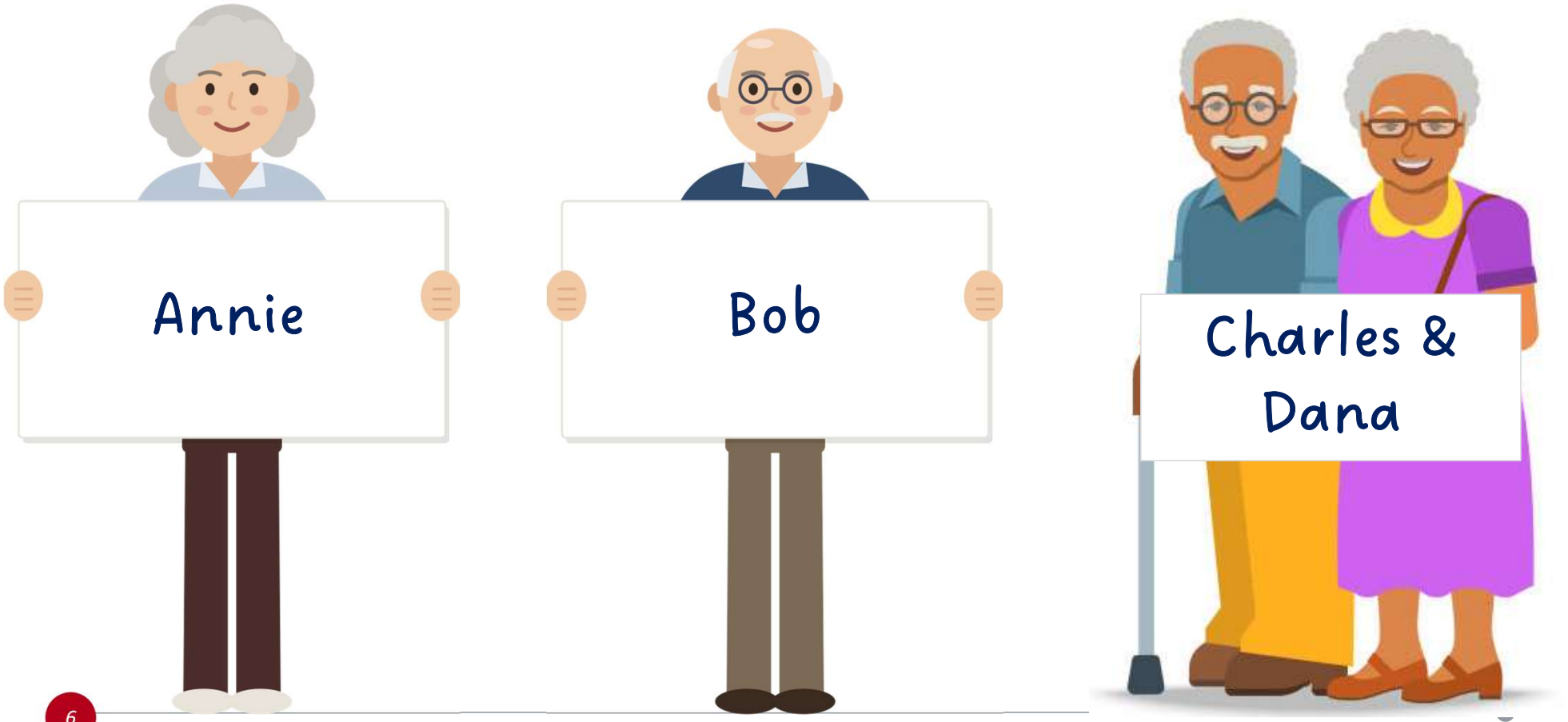
Program Updates

- On July 22, the Select Board approved eligibility requirements and set individual and total exemption amounts for FY27 ($2,000 individual and $200K program).
- The Board of Assessors approved the application form in September 2026.
- The Assessors Office developed and will oversee the application submittal, approval, and exemption distribution process:
  - Applications, available now, can be submitted starting November 1, 2026.
  - Applications are due by November 30, 2026.
  - Exemptions, as approved by the Board of Assessors, will be communicated no later than February 2027.
  - Approved exemptions will be included in FY27 Q4 property tax bills.

Application Eligibility

Age	The (or one) homeowner is at least 65 years old as of December 31, 2025. If home is co-owned, the co-owner must be at least 60 years old as of December 31, 2025.
Residency	You have owned a home in Marblehead as your primary residence for at least 10 years.
Assessed Home Value	Your home's current assessed value is at or below Marblehead's average assessed home value ($1,291,507 — updated annually).
Income Limits	$75,000 single individual, not head of household. $94,000 head of household. $112,000 married couples filing a joint return.
Asset Restrictions	You do not own a second home.
State Circuit Breaker	You have applied for the state's Senior Circuit Breaker tax credit in your 2025 state tax return.

Exemption Examples





1 2025 income **$40,000**

2 FY26 property tax **$6,420**

3 ½ water & sewer bill **$800**



Annie, 72, has lived in her Marblehead home for 20 years. A retired teacher, she has a pension.

1	2025 Income	$ 40,000	Tax % of Income
2	FY26 Property Tax	$ 6,420	
3	50% Water & Sewer	$ 800	
	Initial Total	*$ 7,220*	18%
	State CB Credit	$ 2,820	
	Revised Total	*$ 4,400*	11%
	MHD Exemption	**$ 400**	
	Final Total	*$ 4,000*	*10%*

$400

Annie



1 2025 income **$45,000**

2 FY26 property tax **$5,564**

3 ½ water & sewer bill **$800**



Bob, 80, a grandfather of six, has lived in his Marblehead home for 40 years. A retired machinist, he lives on Social Security and a small pension.



Bob

1	2025 Income	$ 45,000	**Tax % of Income**
2	FY26 Property Tax	$ 5,564	
3	50% Water & Sewer	$ 800	
	Initial Total	$ 6,364	14%
	State CB Credit	$ 1,864	
	Revised Total	$ 4,500	10%
	MHD Exemption	**$ -**	
	Final Total	*$ 4,500*	*10%*

$0



Recent retirees Charles, 62, and Dana, 66, have lived in their Marblehead home for 30 years. They both have IRAs and file their taxes jointly.



1 2025 income **$65,000**

2 FY26 property tax **$9,416**

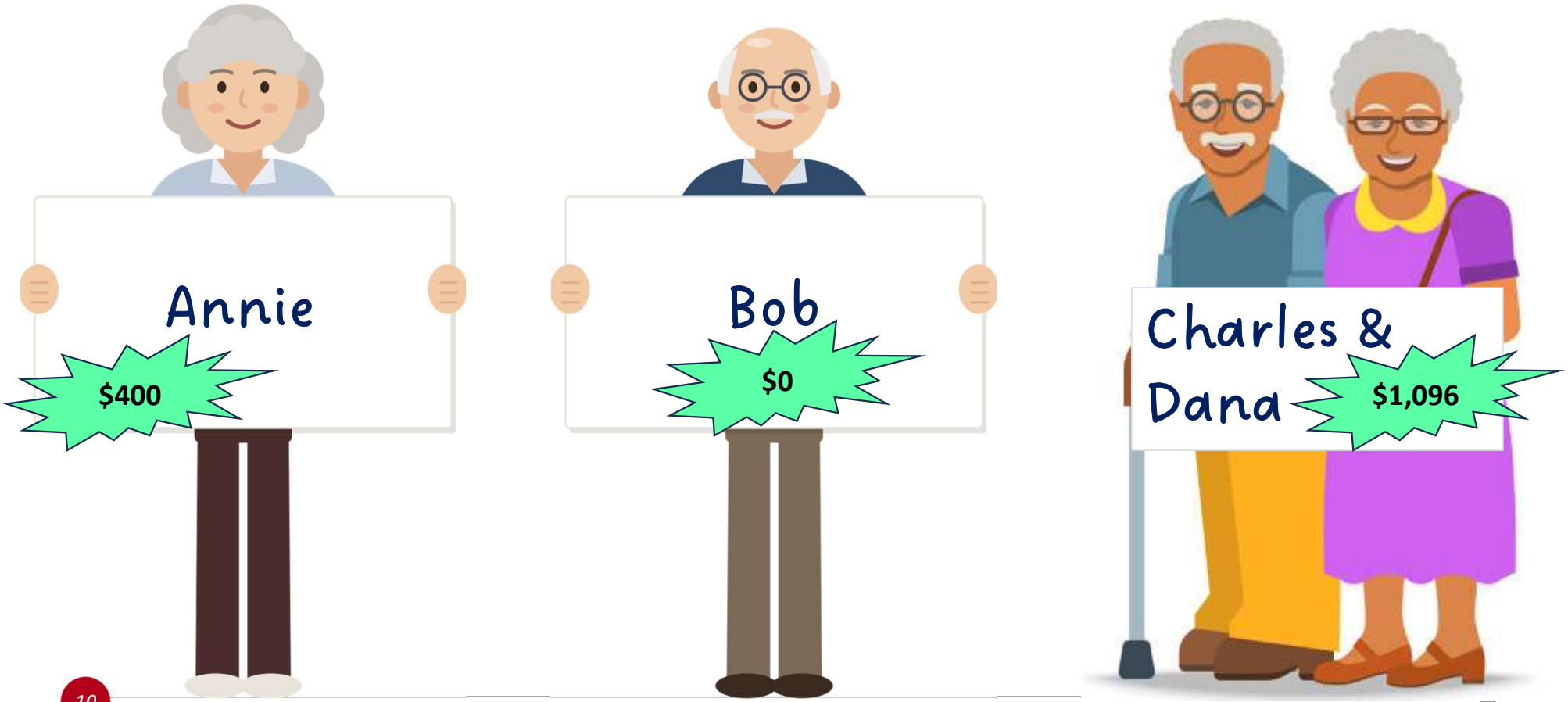
3 ½ water & sewer bill **$1,000**

1	2025 Income	$ 65,000	**Tax % of Income**
2	FY26 Property Tax	$ 9,416	
3	50% Water & Sewer	$ 1,000	
	Initial Total	$ 10,416	16%
	State CB Credit	$ 2,820	
	Revised Total	$ 7,596	12%
	MHD Exemption	**$ 1,096**	
	Final Total	$ 6,500	*10%*

$1,096

Charles & Dana

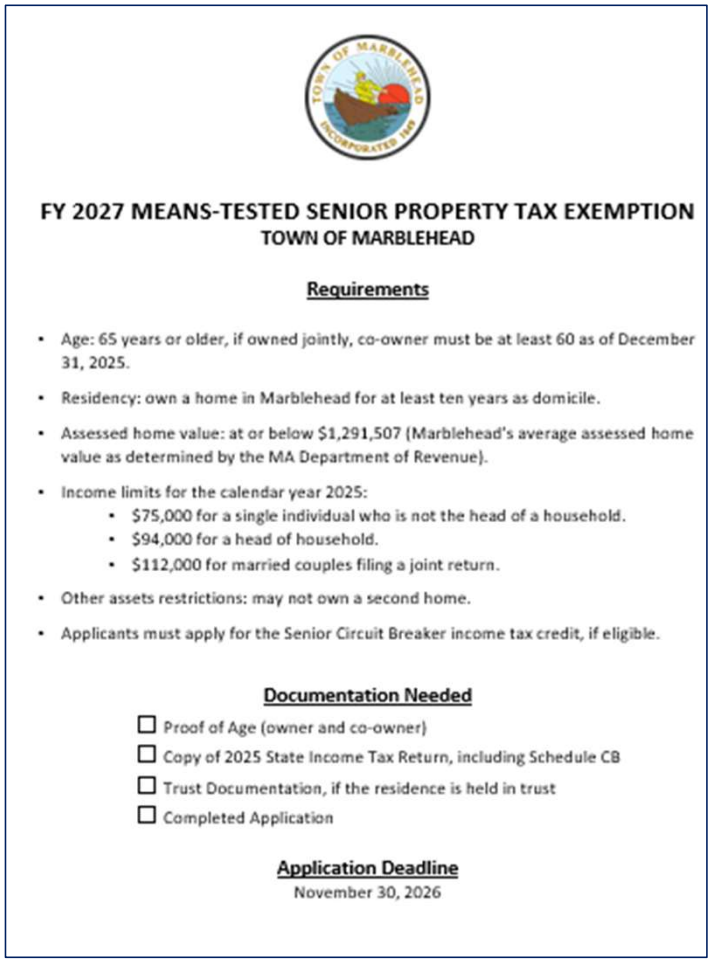
Exemption Outcomes



Application Explainer

Documentation needed

- ❑ Proof of age (owner and co-owner)
- ❑ Copy of 2025 State Income Tax Return, including Schedule CB
- ❑ Trust documentation, if residence is held in trust
- ❑ Completed, signed application



FY 2027 MEANS-TESTED SENIOR PROPERTY TAX EXEMPTION
TOWN OF MARBLEHEAD

Requirements

- Age: 65 years or older, if owned jointly, co-owner must be at least 60 as of December 31, 2025.
- Residency: own a home in Marblehead for at least ten years as domicile.
- Assessed home value: at or below $1,291,507 (Marblehead's average assessed home value as determined by the MA Department of Revenue).
- Income limits for the calendar year 2025:
  - $75,000 for a single individual who is not the head of a household.
  - $94,000 for a head of household.
  - $112,000 for married couples filing a joint return.
- Other assets restrictions: may not own a second home.
- Applicants must apply for the Senior Circuit Breaker income tax credit, if eligible.

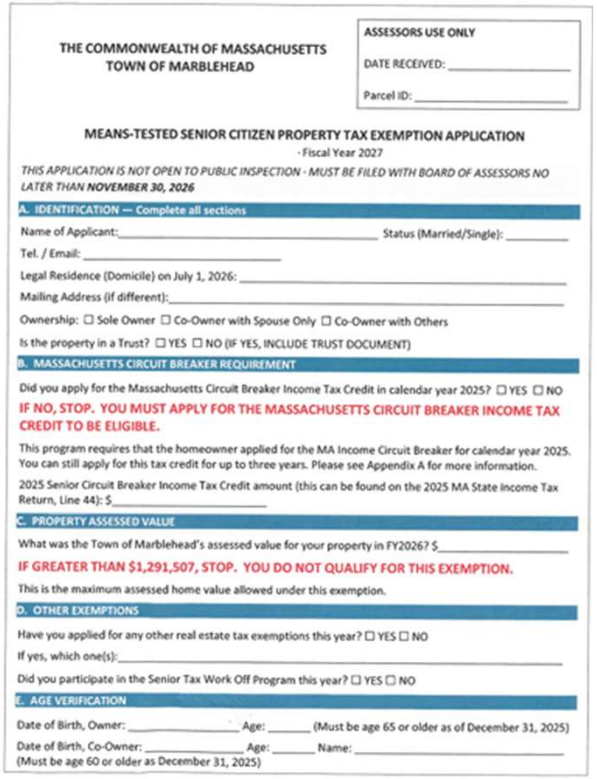
Documentation Needed

- ☐ Proof of Age (owner and co-owner)
- ☐ Copy of 2025 State Income Tax Return, including Schedule CB
- ☐ Trust Documentation, if the residence is held in trust
- ☐ Completed Application

Application Deadline
November 30, 2026

Application Explainer

- The form has nine sections (A-I).
- A few questions need information from your state tax filing. Most information should be easily recalled or found.
- Application forms are available on the Assessor web-site. Printed copies will be available in their office. We also have copies here today.
- Once you have the required documents, this form should take less than an hour to complete.



THE COMMONWEALTH OF MASSACHUSETTS
TOWN OF MARBLEHEAD

ASSESSORS USE ONLY
DATE RECEIVED: _____
Parcel ID: _____

MEANS-TESTED SENIOR CITIZEN PROPERTY TAX EXEMPTION APPLICATION
- Fiscal Year 2027

*THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION - MUST BE FILED WITH BOARD OF ASSESSORS NO LATER THAN **NOVEMBER 30, 2026***

A. IDENTIFICATION — Complete all sections

Name of Applicant:_____ Status (Married/Single): _____
Tel. / Email: _____
Legal Residence (Domicile) on July 1, 2026: _____
Mailing Address (if different): _____
Ownership: ☐ Sole Owner ☐ Co-Owner with Spouse Only ☐ Co-Owner with Others
Is the property in a Trust? ☐ YES ☐ NO (IF YES, INCLUDE TRUST DOCUMENT)

B. MASSACHUSETTS CIRCUIT BREAKER REQUIREMENT

Did you apply for the Massachusetts Circuit Breaker Income Tax Credit in calendar year 2025? ☐ YES ☐ NO
IF NO, STOP. YOU MUST APPLY FOR THE MASSACHUSETTS CIRCUIT BREAKER INCOME TAX CREDIT TO BE ELIGIBLE.
This program requires that the homeowner applied for the MA Income Circuit Breaker for calendar year 2025. You can still apply for this tax credit for up to three years. Please see Appendix A for more information.
2025 Senior Circuit Breaker Income Tax Credit amount (this can be found on the 2025 MA State Income Tax Return, Line 44): $_____

C. PROPERTY ASSESSED VALUE

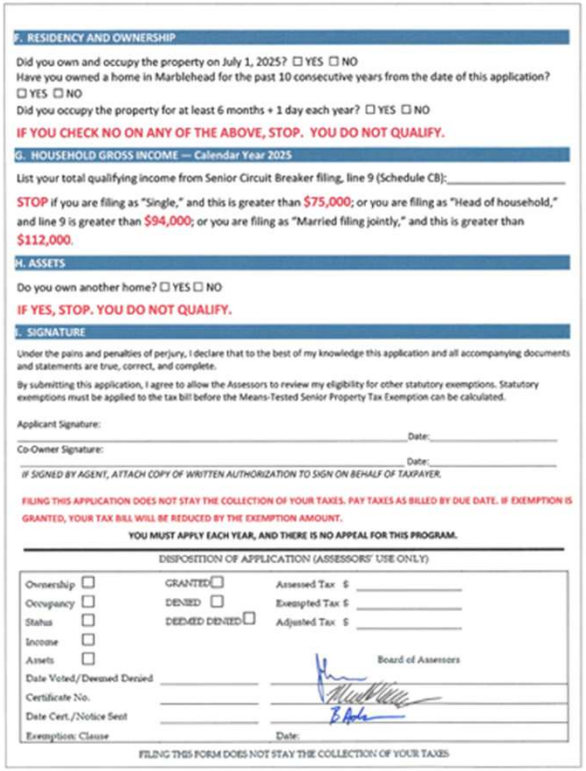
What was the Town of Marblehead's assessed value for your property in FY2026? $_____
IF GREATER THAN $1,291,507, STOP. YOU DO NOT QUALIFY FOR THIS EXEMPTION.
This is the maximum assessed home value allowed under this exemption.

D. OTHER EXEMPTIONS

Have you applied for any other real estate tax exemptions this year? ☐ YES ☐ NO
If yes, which one(s): _____
Did you participate in the Senior Tax Work Off Program this year? ☐ YES ☐ NO

E. AGE VERIFICATION

Date of Birth, Owner: _____ Age: _____ (Must be age 65 or older as of December 31, 2025)
Date of Birth, Co-Owner: _____ Age: _____ Name: _____
(Must be age 60 or older as December 31, 2025)



F. RESIDENCY AND OWNERSHIP

Did you own and occupy the property on July 1, 2025? ☐ YES ☐ NO
Have you owned a home in Marblehead for the past 10 consecutive years from the date of this application? ☐ YES ☐ NO
Did you occupy the property for at least 6 months + 1 day each year? ☐ YES ☐ NO
IF YOU CHECK NO ON ANY OF THE ABOVE, STOP. YOU DO NOT QUALIFY.

G. HOUSEHOLD GROSS INCOME — Calendar Year 2025

List your total qualifying income from Senior Circuit Breaker filing, line 9 (Schedule CB): _____
STOP if you are filing as "Single," and this is greater than $75,000; or you are filing as "Head of household," and line 9 is greater than $94,000; or you are filing as "Married filing jointly," and this is greater than $112,000.

H. ASSETS

Do you own another home? ☐ YES ☐ NO
IF YES, STOP. YOU DO NOT QUALIFY.

I. SIGNATURE

Under the pains and penalties of perjury, I declare that to the best of my knowledge this application and all accompanying documents and statements are true, correct, and complete.
By submitting this application, I agree to allow the Assessors to review my eligibility for other statutory exemptions. Statutory exemptions must be applied to the tax bill before the Means-Tested Senior Property Tax Exemption can be calculated.

Applicant Signature: _____ Date: _____
Co-Owner Signature: _____ Date: _____
IF SIGNED BY AGENT, ATTACH COPY OF WRITTEN AUTHORIZATION TO SIGN ON BEHALF OF TAXPAYER.

FILING THIS APPLICATION DOES NOT STAY THE COLLECTION OF YOUR TAXES. PAY TAXES AS BILLED BY DUE DATE. IF EXEMPTION IS GRANTED, YOUR TAX BILL WILL BE REDUCED BY THE EXEMPTION AMOUNT.
YOU MUST APPLY EACH YEAR, AND THERE IS NO APPEAL FOR THIS PROGRAM.

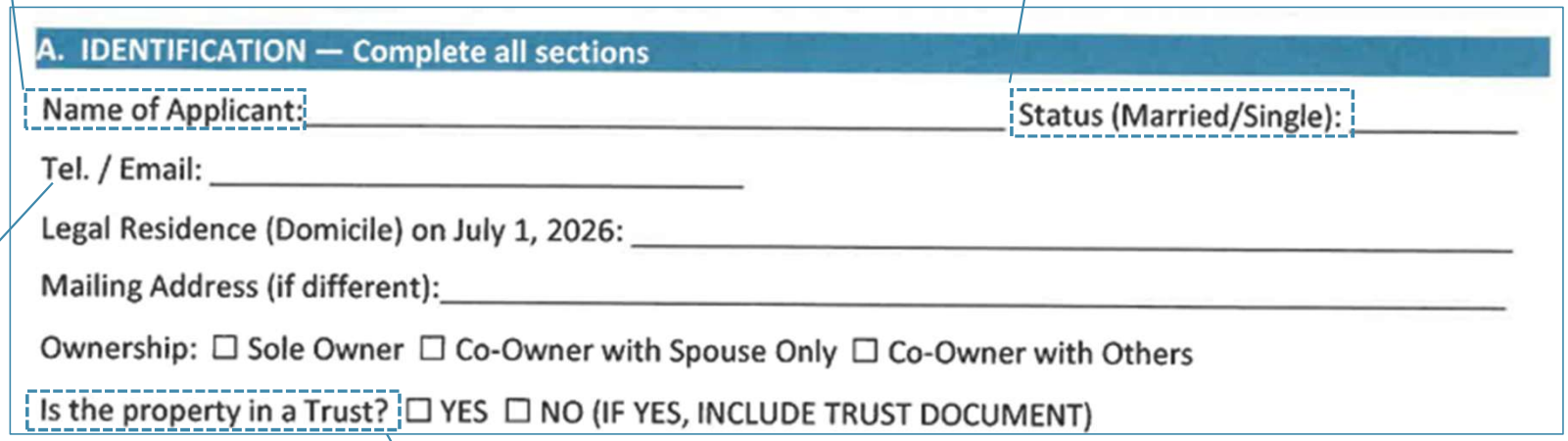
DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)

Ownership ☐ Occupancy ☐ Status ☐ Income ☐ Assets ☐
GRANTED ☐ DENIED ☐ DEEMED DENIED ☐
Assessed Tax $ _____ Exempted Tax $ _____ Adjusted Tax $ _____
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

Provide name of primary applicant. If there is a co-owner, provide their name in Section E. Name(s) must match proof of identification, which is part of the documentation to be submitted with this applications.

If Divorced or Widowed, write Single.



A. IDENTIFICATION — Complete all sections

Name of Applicant: _____ Status (Married/Single): _____

Tel. / Email: _____

Legal Residence (Domicile) on July 1, 2026: _____

Mailing Address (if different): _____

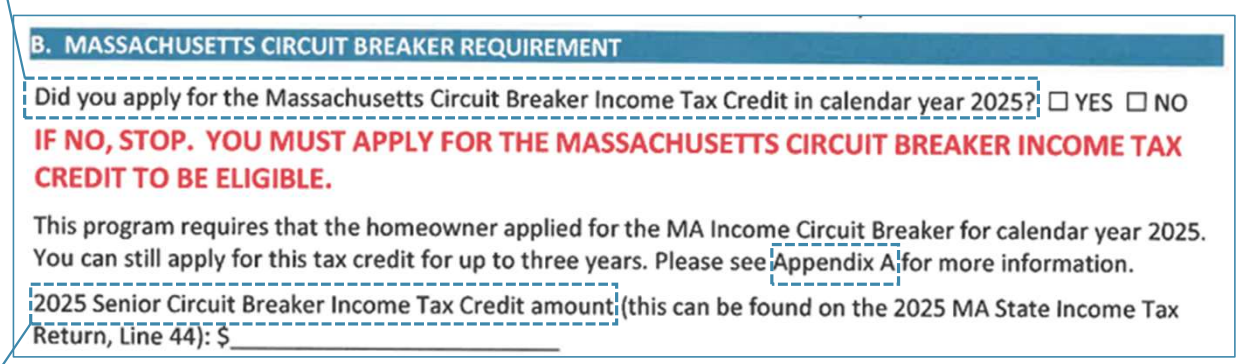
Ownership: ☐ Sole Owner ☐ Co-Owner with Spouse Only ☐ Co-Owner with Others

Is the property in a Trust? ☐ YES ☐ NO (IF YES, INCLUDE TRUST DOCUMENT)

Provide both telephone number and email address.

Town Assessors | Helpful Links |Online Property Data Tool has property ownership information.
If property is in a Trust, a copy of the Trust document must be included with this application.

Your 2025 tax documentation should include a Schedule CB form. This is part of the documentation to be submitted with this application.



B. MASSACHUSETTS CIRCUIT BREAKER REQUIREMENT

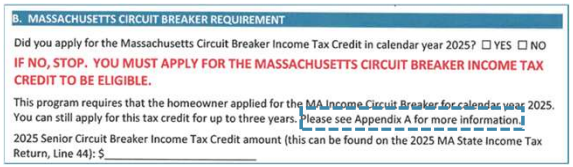
Did you apply for the Massachusetts Circuit Breaker Income Tax Credit in calendar year 2025? ☐ YES ☐ NO

IF NO, STOP. YOU MUST APPLY FOR THE MASSACHUSETTS CIRCUIT BREAKER INCOME TAX CREDIT TO BE ELIGIBLE.

This program requires that the homeowner applied for the MA Income Circuit Breaker for calendar year 2025. You can still apply for this tax credit for up to three years. Please see Appendix A for more information.

2025 Senior Circuit Breaker Income Tax Credit amount (this can be found on the 2025 MA State Income Tax Return, Line 44): $_____

No additional calculations are needed; simply record the dollar amount from Line 44 of your MA State Income Tax.
Your 2025 MA State Income Tax is part of the documentation to be submitted with this application.



B. MASSACHUSETTS CIRCUIT BREAKER REQUIREMENT

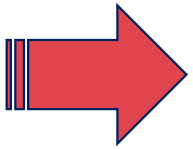
Did you apply for the Massachusetts Circuit Breaker Income Tax Credit in calendar year 2025? ☐ YES ☐ NO

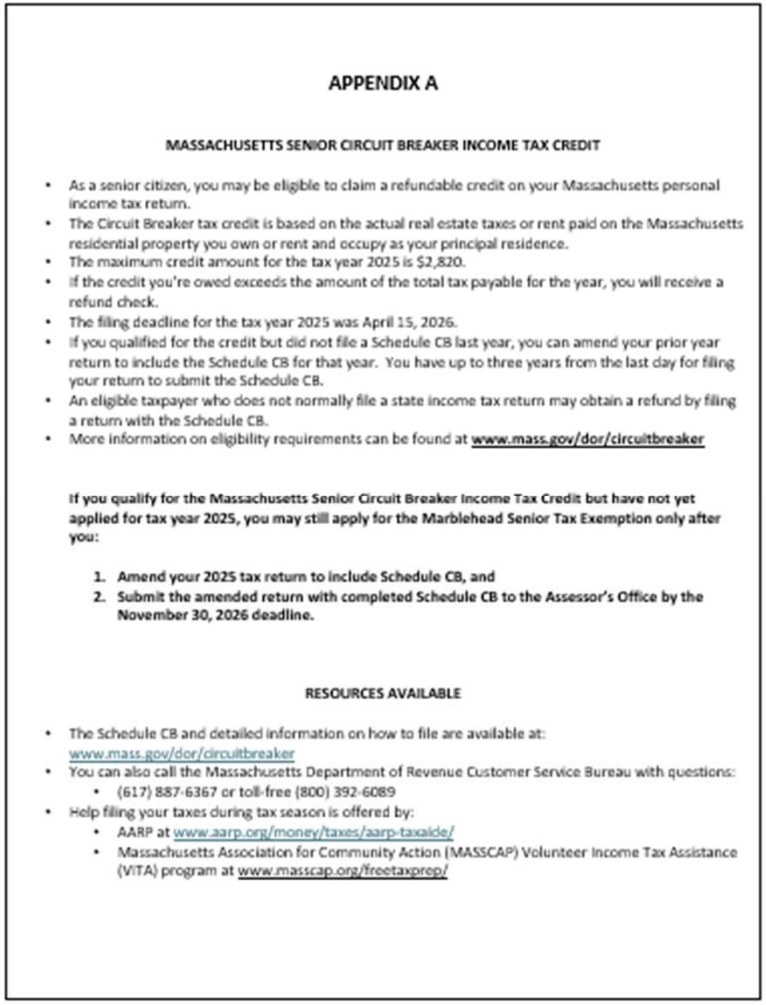
IF NO, STOP. YOU MUST APPLY FOR THE MASSACHUSETTS CIRCUIT BREAKER INCOME TAX CREDIT TO BE ELIGIBLE.

This program requires that the homeowner applied for the MA Income Circuit Breaker for calendar year 2025. You can still apply for this tax credit for up to three years. Please see Appendix A for more information.

2025 Senior Circuit Breaker Income Tax Credit amount (this can be found on the 2025 MA State Income Tax Return, Line 44): $_____

Appendix A: Massachusetts Circuit Breaker Income Tax Credit Information





APPENDIX A

MASSACHUSETTS SENIOR CIRCUIT BREAKER INCOME TAX CREDIT

- As a senior citizen, you may be eligible to claim a refundable credit on your Massachusetts personal income tax return.
- The Circuit Breaker tax credit is based on the actual real estate taxes or rent paid on the Massachusetts residential property you own or rent and occupy as your principal residence.
- The maximum credit amount for the tax year 2025 is $2,820.
- If the credit you're owed exceeds the amount of the total tax payable for the year, you will receive a refund check.
- The filing deadline for the tax year 2025 was April 15, 2026.
- If you qualified for the credit but did not file a Schedule CB last year, you can amend your prior year return to include the Schedule CB for that year. You have up to three years from the last day for filing your return to submit the Schedule CB.
- An eligible taxpayer who does not normally file a state income tax return may obtain a refund by filing a return with the Schedule CB.
- More information on eligibility requirements can be found at **www.mass.gov/dor/circuitbreaker**

If you qualify for the Massachusetts Senior Circuit Breaker Income Tax Credit but have not yet applied for tax year 2025, you may still apply for the Marblehead Senior Tax Exemption only after you:

1. **Amend your 2025 tax return to include Schedule CB, and**
2. **Submit the amended return with completed Schedule CB to the Assessor's Office by the November 30, 2026 deadline.**

RESOURCES AVAILABLE

- The Schedule CB and detailed information on how to file are available at: www.mass.gov/dor/circuitbreaker
- You can also call the Massachusetts Department of Revenue Customer Service Bureau with questions:
  - (617) 887-6367 or toll-free (800) 392-6089
- Help filing your taxes during tax season is offered by:
  - AARP at www.aarp.org/money/taxes/aarp-taxaide/
  - Massachusetts Association for Community Action (MASSCAP) Volunteer Income Tax Assistance (VITA) program at www.masscap.org/freetaxprep/

B. MASSACHUSETTS CIRCUIT BREAKER REQUIREMENT

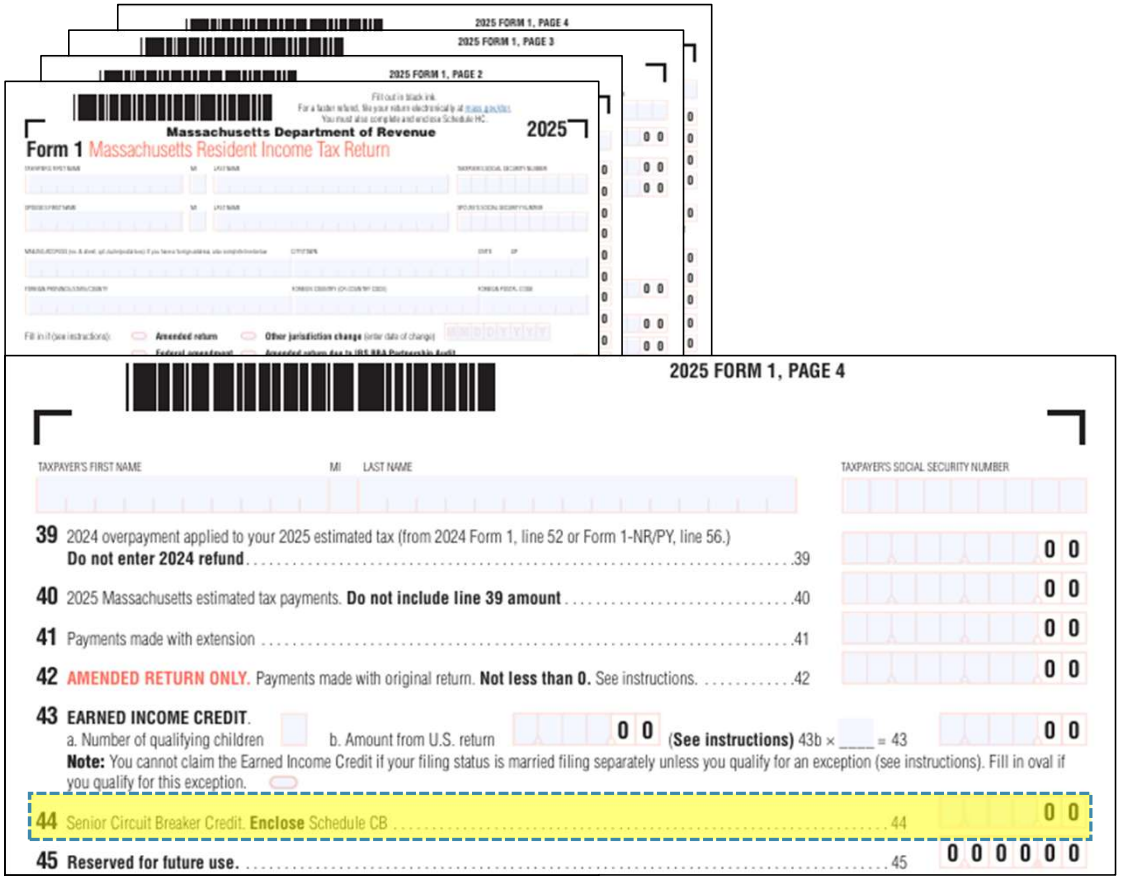
Did you apply for the Massachusetts Circuit Breaker Income Tax Credit in calendar year 2025? ☐ YES ☐ NO

IF NO, STOP. YOU MUST APPLY FOR THE MASSACHUSETTS CIRCUIT BREAKER INCOME TAX CREDIT TO BE ELIGIBLE.

This program requires that the homeowner applied for the MA Income Circuit Breaker for calendar year 2025. You can still apply for this tax credit for up to three years. Please see Appendix A for more information.

2025 Senior Circuit Breaker Income Tax Credit amount (this can be found on the 2025 MA State Income Tax Return, Line 44): $

Massachusetts 2025 State Income Tax Form



2025 FORM 1, PAGE 4

2025 FORM 1, PAGE 3

2025 FORM 1, PAGE 2

Massachusetts Department of Revenue

2025

Form 1 Massachusetts Resident Income Tax Return

2025 FORM 1, PAGE 4

TAXPAYER'S FIRST NAME MI LAST NAME TAXPAYER'S SOCIAL SECURITY NUMBER

39 2024 overpayment applied to your 2025 estimated tax (from 2024 Form 1, line 52 or Form 1-NR/PY, line 56.) **Do not enter 2024 refund** 39 0 0

40 2025 Massachusetts estimated tax payments. **Do not include line 39 amount** 40 0 0

41 Payments made with extension 41 0 0

42 **AMENDED RETURN ONLY.** Payments made with original return. **Not less than 0.** See instructions. 42 0 0

43 **EARNED INCOME CREDIT.**
a. Number of qualifying children b. Amount from U.S. return 0 0 **(See instructions)** 43b × ____ = 43 0 0
Note: You cannot claim the Earned Income Credit if your filing status is married filing separately unless you qualify for an exception (see instructions). Fill in oval if you qualify for this exception.

44 Senior Circuit Breaker Credit. **Enclose** Schedule CB 44 0 0

45 **Reserved for future use.** 45 0 0 0 0 0 0







This information can be found using the Online Property Tax tool. It is also shown on the FY 2026 Actual Real Estate Tax Bill for Q3 and Q4.
If you are having trouble locating the assessed value, please call the Assessor's Office for assistance.

C. PROPERTY ASSESSED VALUE

What was the Town of Marblehead's assessed value for your property in FY2026? $_____

IF GREATER THAN $1,291,507, STOP. YOU DO NOT QUALIFY FOR THIS EXEMPTION.

This is the maximum assessed home value allowed under this exemption.

Finding Assessed Value

Marblehead Town Assessors
https://www.marbleheadma.gov › assessors-office



Helpful Links

- Assessor's Office
- Marblehead Property Tax Guide
- Board of Assessors FAQs
- Means-Tested Senior Citizen Property Tax Exemption
- GIS/Maps
- Online Property Data
- Change of Address Form
- Motor Vehicle & Trailer Excise
- Boat Excise
- Exemptions
- Personal Property Tax
- Income & Expense Form
- Religious & Charitable Organizations

HOME | SEARCH | SUMMARY | INTERIOR | EXTERIOR | SALES | MAPS | ABOUT

WebPro

Parcel | Owner | Street name DEVEREUX ST | Street num 19
Building type | Year built thru | Beds thru | Baths thru
Lot size thru | Fin-size thru | NHood desc | LUC desc
Total value thru | Sale price thru | Length Sales | Sale date thru | Book Page
Include Non-Arms
Clear form

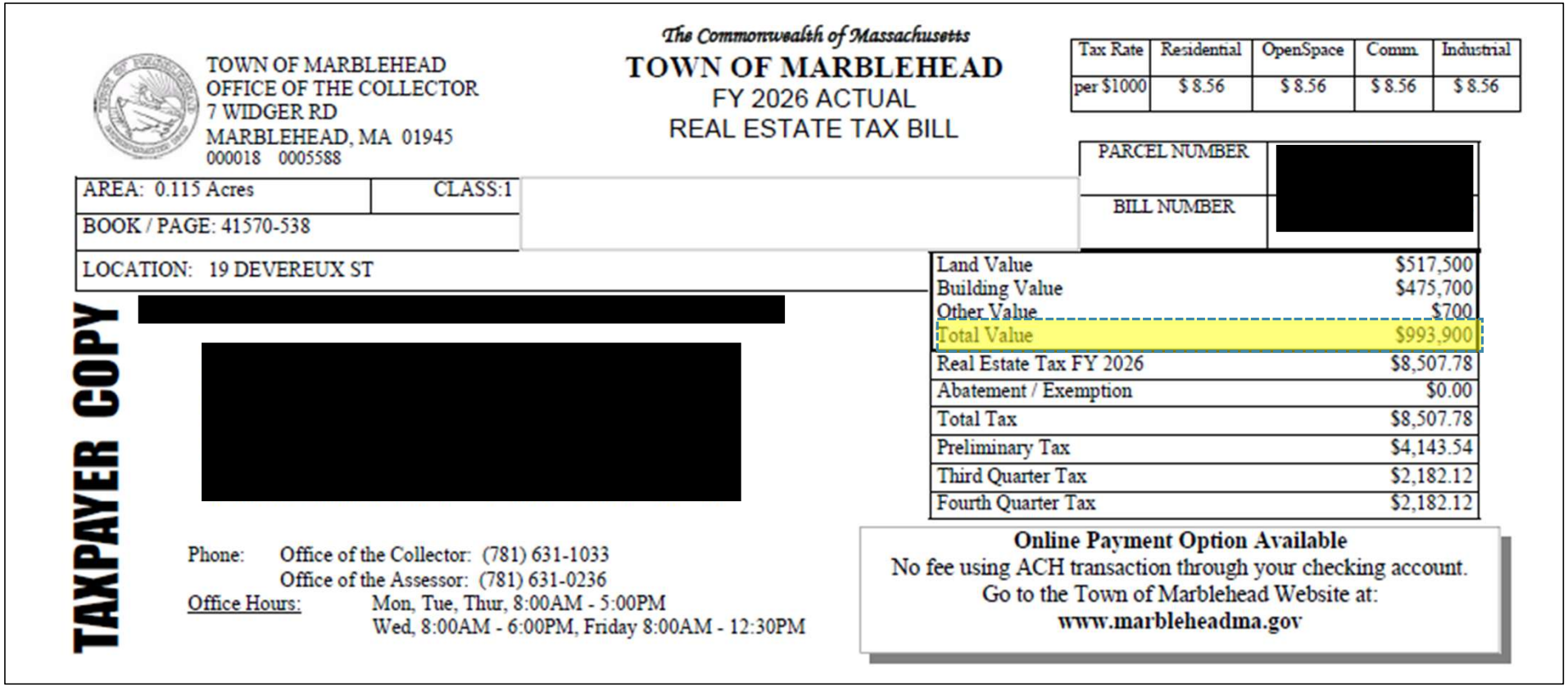
Print page 1 of 1

Click on the Column Headings to sort accordingly.
Click on the Parcel ID to view the parcel detail.

Parcel ID	Location	Owner	Built Type	Total Value	Beds Baths	Lot size Fin area	LUC Description	NHood	Sale date Sale price	Book Page
87 10 0	19 DEVEREUX ST	ALEXANDROU LEON LAMBKIN JEANN LEON J ALEXANDROU LIVING TR JEANNE T LAMBKIN LIVING TRUST	1905 OLD STYLE	$993,900	3 2	5,001 2,212	101 ONE FAM	AQ	5/19/2023 $10	41570-538

Print page 1 of 1

Finding Assessed Value



The Commonwealth of Massachusetts

TOWN OF MARBLEHEAD
FY 2026 ACTUAL
REAL ESTATE TAX BILL

TOWN OF MARBLEHEAD
OFFICE OF THE COLLECTOR
7 WIDGER RD
MARBLEHEAD, MA 01945
000018 0005588

Tax Rate	Residential	OpenSpace	Comm.	Industrial
per $1000	$ 8.56	$ 8.56	$ 8.56	$ 8.56

PARCEL NUMBER [redacted]
BILL NUMBER

AREA: 0.115 Acres CLASS:1
BOOK / PAGE: 41570-538
LOCATION: 19 DEVEREUX ST

[redacted]

[redacted]

Land Value	$517,500
Building Value	$475,700
Other Value	$700
Total Value	$993,900
Real Estate Tax FY 2026	$8,507.78
Abatement / Exemption	$0.00
Total Tax	$8,507.78
Preliminary Tax	$4,143.54
Third Quarter Tax	$2,182.12
Fourth Quarter Tax	$2,182.12

TAXPAYER COPY

Phone: Office of the Collector: (781) 631-1033
Office of the Assessor: (781) 631-0236
Office Hours: Mon, Tue, Thur, 8:00AM - 5:00PM
Wed, 8:00AM - 6:00PM, Friday 8:00AM - 12:30PM

Online Payment Option Available
No fee using ACH transaction through your checking account.
Go to the Town of Marblehead Website at:
www.marbleheadma.gov



Finding Assessed Value

Assessor's Office

Todd Laramie | Assistant Assessor

Contact

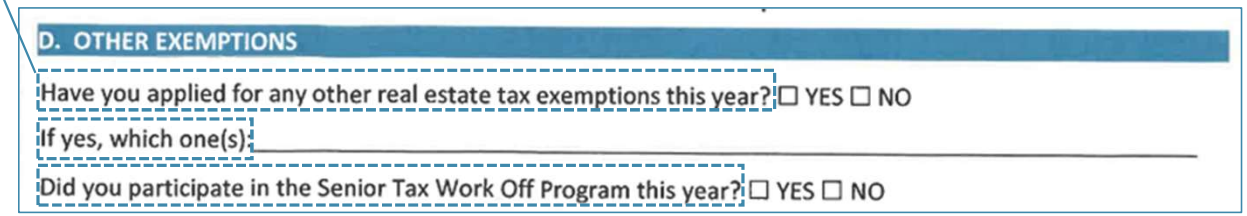
Phone: (781) 631-0236
Fax: (781) 631-2617
assessors@marbleheadma.gov

Mary Alley Municipal Building
Assessors Office
7 Widger Road
Marblehead, MA 01945

Hours of Operation

Monday, Tuesday & Thursday: 8:00 am to 5:00 pm
Wednesday: 8:00 am to 6:00 pm
Friday: 8:00 am to 12:30 pm

Please indicate if you have received other exemptions this year, e.g., senior or veteran's exemptions. If you are uncertain which, if any, exemptions you received this year, consider checking with the relevant department or call the Assessor's Office for assistance.



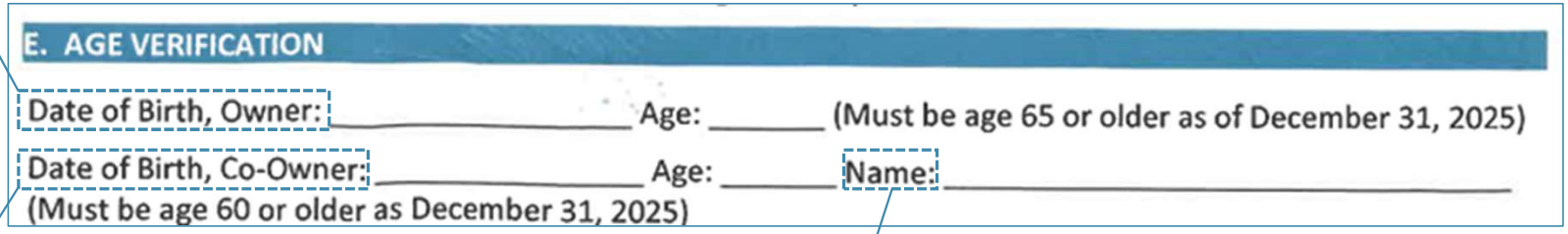
D. OTHER EXEMPTIONS

Have you applied for any other real estate tax exemptions this year? ☐ YES ☐ NO

If yes, which one(s) _____

Did you participate in the Senior Tax Work Off Program this year? ☐ YES ☐ NO

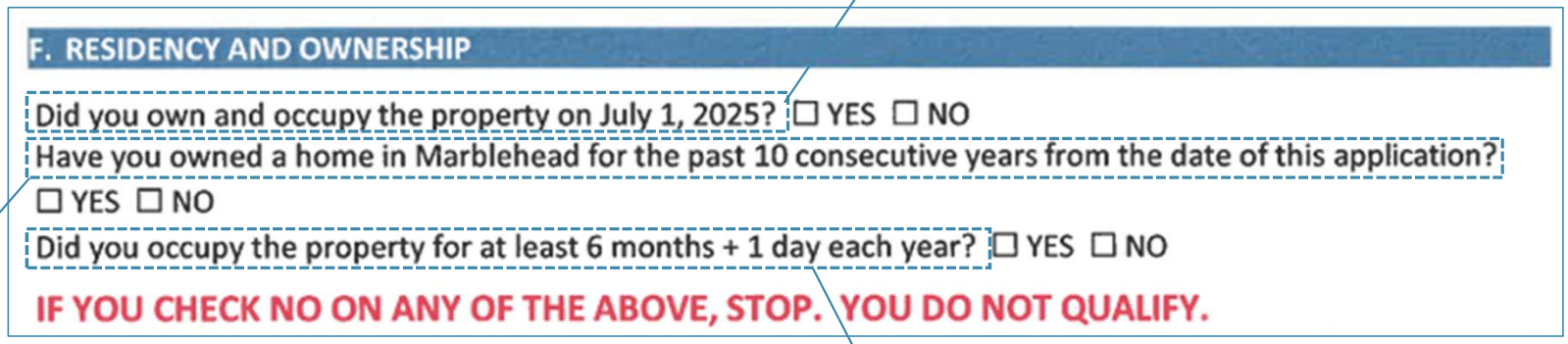
Information for the primary applicant.



Information for the co-owner.

The name of co-owner must match proof of identification, which is part of the documentation to be submitted with this application.

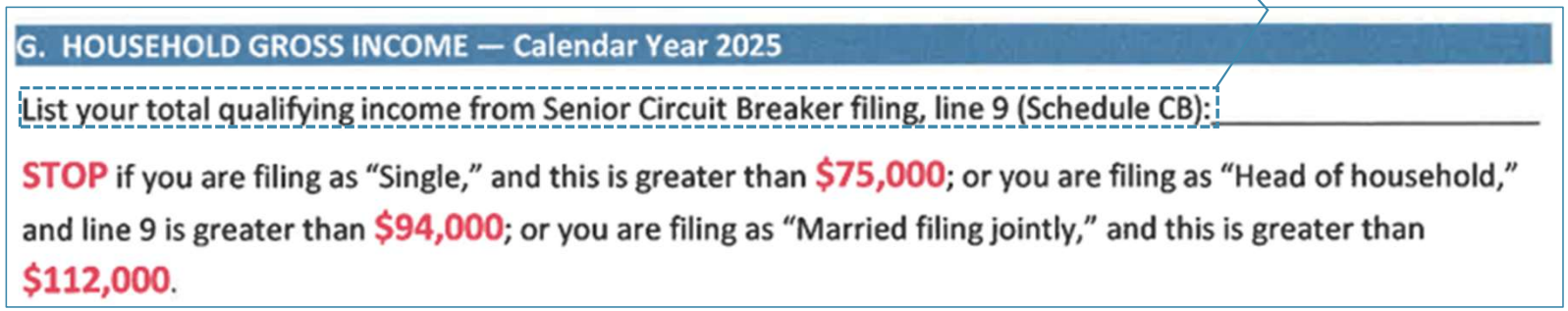
Pertains to the property listed in Section A. Program eligibility is limited to applicants who have resided at the listed property for the full fiscal year.



Pertains to ten-year residency requirement. You do not need to list prior residences.

Pertains to primary residence requirement. You do not need to specify the actual time in residence each year.

No additional calculations are needed; simply record the dollar amount from Line 9 of your MA State Schedule CB.
Your 2025 MA State Income Tax is part of the documentation to be submitted with this application.

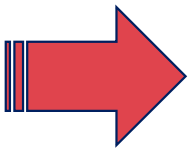


G. HOUSEHOLD GROSS INCOME — Calendar Year 2025

List your total qualifying income from Senior Circuit Breaker filing, line 9 (Schedule CB): _____

STOP if you are filing as "Single," and this is greater than **$75,000**; or you are filing as "Head of household," and line 9 is greater than **$94,000**; or you are filing as "Married filing jointly," and this is greater than **$112,000**.

Massachusetts 2025 Schedule CB



[redacted]

FIRST NAME | M.I. | LAST NAME | SOCIAL SECURITY NUMBER

You, or your spouse if married filing jointly, must be at least 65 years of age before January 1, 2026 to qualify for this credit. Also, you must file as single, married filing jointly or head of household to qualify for this credit. If married filing separately, you do not qualify for this credit.

Schedule CB Circuit Breaker Credit. Enclose with Form 1 or Form 1-NR/PY. Do not cut or separate these schedules. **2025**

ADDRESS OF PRINCIPAL RESIDENCE IN MASSACHUSETTS (DO NOT ENTER PO BOX) | CITY/TOWN | STATE | ZIP

1 Living quarters status during 2025: Select one only. Note: If you moved during the year, see instructions. ☐ Homeowner. Fill in if: ☐ multi-use or multi-family property ☐ land exceeds one acre (see instructions) ☐ Renter (If you received any federal and/or state rent subsidy, or you rent from a tax-exempt entity, you do not qualify for the Circuit Breaker Credit; see instructions)

2 Homeowners only, enter assessed value of principal residence as of January 1, 2025. If over $1,298,000, you do not qualify for this credit. See instructions. 2 0 0

INCOME CALCULATION

3 Massachusetts adjusted gross income (from line 20 of Schedule CB, line 3 worksheet on reverse) 3 0 0

4 Full amount of Social Security benefits received before Medicare premiums (from Form 1099) 4 0 0

5 Pensions/annuities/IRA/Keogh distributions not taxed on your Massachusetts tax return 5 0 0

6 Miscellaneous income, including cash public assistance 6 0 0

7 Massachusetts total income. Add lines 3 through 6 ..... 7 0 0

8 Combine Form 1, lines 2b through 2d or Form 1-NR/PY, lines 4b through 4d 8 0 0

9 Qualifying income. Subtract line 8 from line 7 ..... 9 0 0
You do *not* qualify for the Circuit Breaker Credit if you are filing as "**Single,**" and line 9 is greater than **$75,000**; or you are filing as "**Head of household,**" and line 9 is greater than **$94,000**; or you are filing as "**Married filing jointly,**" and line 9 is greater than **$112,000**.

CREDIT CALCULATION. If you filled in "Homeowner" in line 1, complete lines 10–17; if "Renter," skip to line 18.

10 Real estate taxes paid in calendar year 2025 for your principal residence (see instructions) 10 0 0

11 Adjustments to real estate taxes (from line 4 of Schedule CB, line 11 worksheet on reverse) 11 0 0

12 Subtract line 11 from line 10 ..... 12 0 0

13 Enter 50% (.50) of water and sewer use charges paid in 2025 ..... 13 0 0

14 Add lines 12 and 13 ..... 14 0 0

15 Income threshold. Multiply line 9 by 10% (.10) 15 0 0

16 Subtract line 15 from line 14. If line 15 is equal to or greater than line 14, you do not qualify for this credit. 16 0 0

17 Enter the lesser of line 16 or $2,820 here and on Form 1, line 44 or Form 1-NR/PY, line 48 ..... 17 0 0

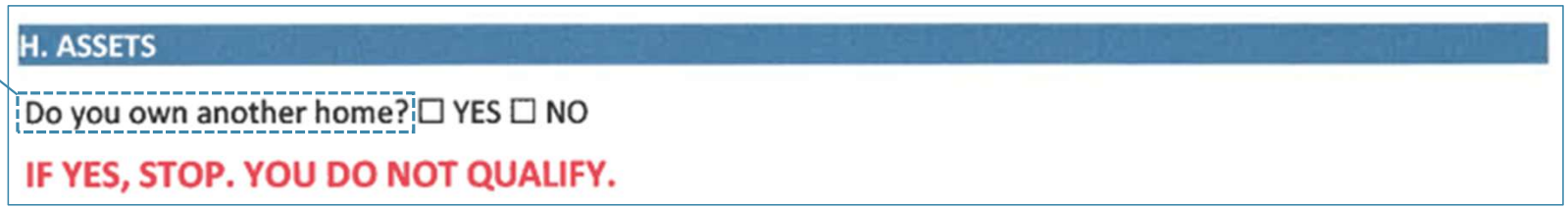
18 Enter total amount of rent paid for your principal residence in 2025: a. 0 0 x 4 = ... 18 0 0
Landlord's name and address

19 Income threshold. Multiply line 9 by 10% (.10) 19 0 0

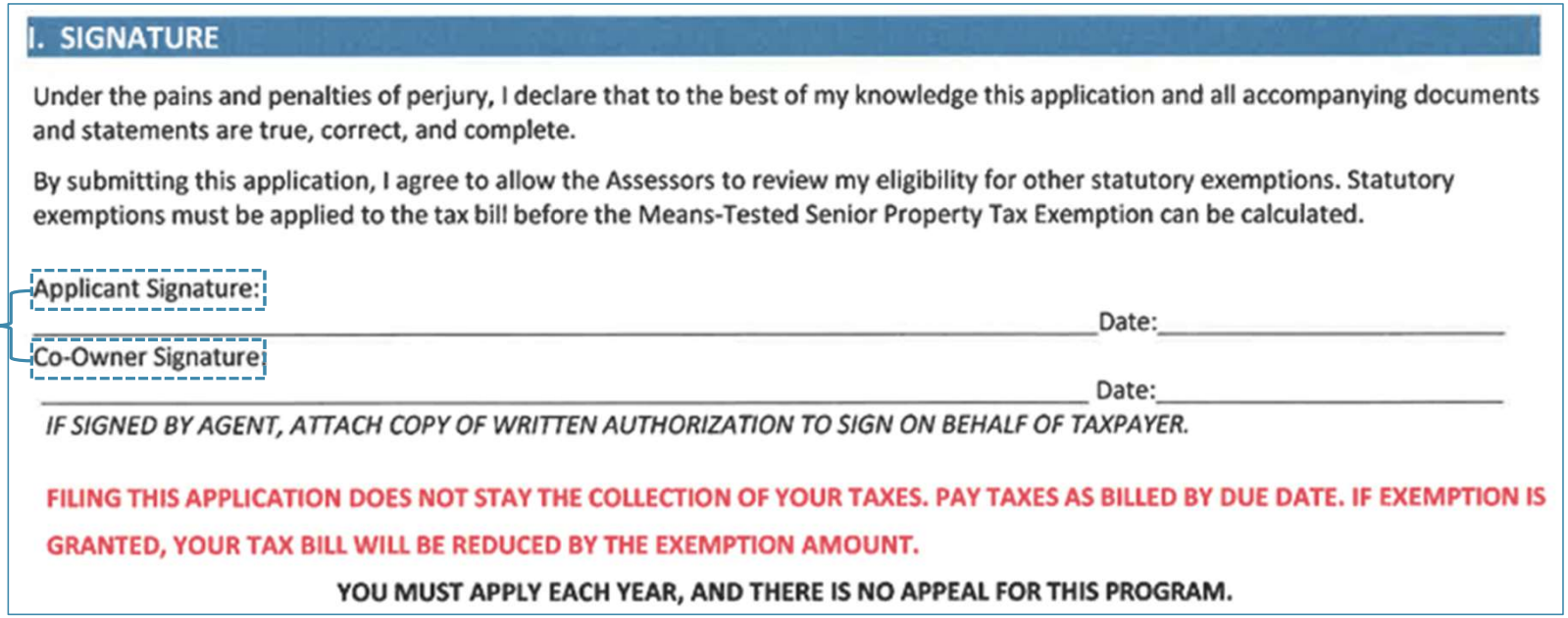
20 Subtract line 19 from line 18. If line 19 is equal to or greater than line 18, you do not qualify for this credit. 20 0 0

21 Enter the lesser of line 20 or $2,820 here and on Form 1, line 44 or Form 1-NR/PY, line 48 ..... 21 0 0

Pertains to asset restrictions.



Applicant(s) should sign and date after reviewing all information and all required documentation. Mailed applications must be postmarked no later than 11/30/26. Applications can be dropped off in person to the Assessors Office through close of business Monday, 11/30/26.
It is recommended that you retain a copy of your application and supporting documents.



I. SIGNATURE

Under the pains and penalties of perjury, I declare that to the best of my knowledge this application and all accompanying documents and statements are true, correct, and complete.

By submitting this application, I agree to allow the Assessors to review my eligibility for other statutory exemptions. Statutory exemptions must be applied to the tax bill before the Means-Tested Senior Property Tax Exemption can be calculated.

Applicant Signature: _____ Date: _____

Co-Owner Signature: _____ Date: _____

IF SIGNED BY AGENT, ATTACH COPY OF WRITTEN AUTHORIZATION TO SIGN ON BEHALF OF TAXPAYER.

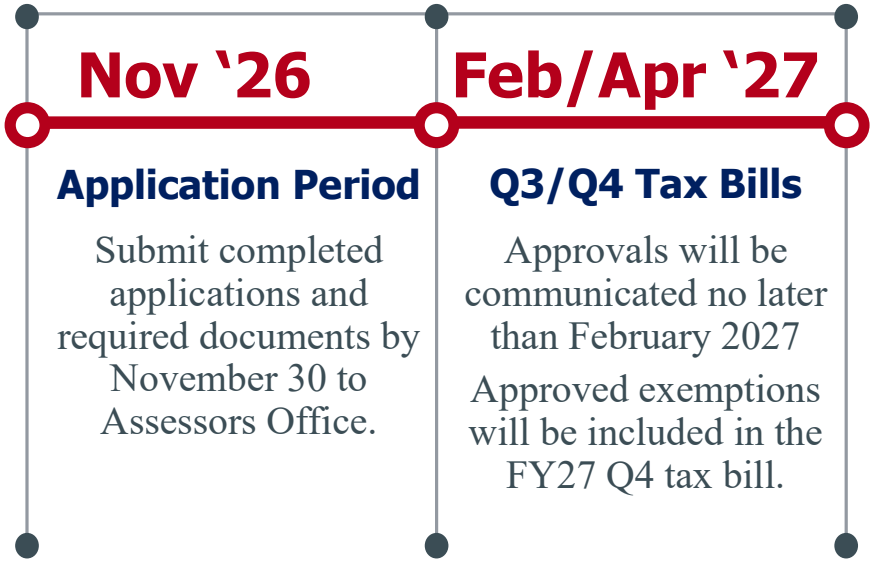
FILING THIS APPLICATION DOES NOT STAY THE COLLECTION OF YOUR TAXES. PAY TAXES AS BILLED BY DUE DATE. IF EXEMPTION IS GRANTED, YOUR TAX BILL WILL BE REDUCED BY THE EXEMPTION AMOUNT.

YOU MUST APPLY EACH YEAR, AND THERE IS NO APPEAL FOR THIS PROGRAM.

Program Timeline

Next Steps

- ❑ Applications are available at Assessors Office and website.
- ❑ Additional help will be available at drop-in coaching sessions at Abbot Library:
  - ➢ There will be two Office Hour sessions on Tuesday Nov 10 and 17 from 1 – 3 PM in the Event Center.
  - ➢ Bring your application and required documents and volunteers will help you finalize your application.



Q&A

Thank you!

