

APPLICATION FOR MEANS TESTED SENIOR EXEMPTION TOWN OF SUDBURY

APPLICATION FOR EXEMPTION General Court of the
Commonwealth of Massachusetts Chapter 169 Acts of 2012

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION

OWNER/APPLICANT SECTION

A. Name of assessed owner(s):

B. Date of Birth:

____/____/____

C. Marital Status:

D. Phone:

E. Legal Residence: _____

F. Mailing Address if Different:

G. Did you own the property
identified in § E. above on
December 31, 2012?

If yes, were you:

Sole Owner _____

Co-owner with spouse only _____

Co-owner with other(s) _____

H. Was the title to the property held in a trust as of December 31, 2012?

If yes, please attach all trust instruments including schedules.

CO-OWNER AGE ELIGIBILITY & RESIDENCY SECTION

I. Were all co-owners at least 60 years of age on or before December 31, 2012? _____

J. If yes, please state the full name and date of birth for all
co-owners:

Co-owner 1 Name: _____

Co-owner 1 D.O.B. ____/____/____

Co-owner 2 Name: _____

Co-owner 2 D.O.B. ____/____/____

Co-owner 3 Name: _____

Co-owner 3 D.O.B. ____/____/____

K. Have you or a co-owner
owned and occupied
property in Sudbury as
your primary domicile for
at least 10 consecutive
years prior to December
31, 2012?

If no, please tell us the years you
have lived consecutively in
Sudbury:

From: _____

Through: _____

REQUIRED DOCUMENTATION

L. The following documentation is required as part of your application and must be submitted by application filing deadline:

- **Pages 1 & 2 of 2012 Federal Income Tax 1040, 1040A, 1040 EZ etc.**
- **2012 Schedule CB Circuit Breaker**
- **Trust documentation (if applicable, see § H. above)**

Please note: Even if you did not file a Massachusetts State Income Tax Return, you must complete, execute and submit a copy of Schedule CB Circuit Breaker 2012.

ASSETS/VALUE OF PROPERTY OWNED

M. Real Estate (List Below)		
	Assessed Value FY 2013	Amount due on Mortgage(s)
Primary Domicile Address:	\$	\$
Other Real Estate Address(es): _____	\$	\$
_____	\$	\$
Total	\$	\$

N. Personal Property (List Below)		
Bank Accounts:	Total Value of all bank accounts	\$
Stocks, Bonds, Securities:	Total Value of all stock, bonds, securities	\$
Any other personal property including cash value of life insurance policies, retirement accounts:	Total Value of other personal property	\$

DEBTS/LIABILITIES

O. Please describe with specificity your debts other than the mortgages listed above, if any:	Amount
	\$
	\$

Signatures

P. **BY SIGNING BELOW I REPRESENT THAT TO THE BEST OF MY KNOWLEDGE AND BELIEF, THE INFORMATION CONTAINED IN THIS APPLICATION AND ALL ACCOMPANYING DOCUMENTS AND STATEMENTS ARE TRUE, ACCURATE AND COMPLETE.** If signed by agent, attach copy of written authorization to sign on behalf of taxpayer. By the execution hereof, any such agent represents to the best of his/her knowledge after due inquiry, that the information contained in this application and all accompanying documents and statements are true, accurate and complete

Signature of applicant: _____

Signature of agent: _____

Date: _____

Print Name: _____