



## Elderly and Disabled Taxation Aid Committee

### **Minutes – April 27, 2020**

A meeting of the Elderly and Disabled Taxation Aid Committee originally scheduled for April 9, 2020 was held on April 27, 2020 via a Google Hangout telephone conference. Present for this meeting were Mark Hausammann, Louis Jutras, Caren Klipp, Paula Nute and Michael Pazyra. The meeting was called to discuss Elderly/Disabled Tax Relief applications.

### **CALL TO ORDER**

Mr. Pazyra called the meeting to order at 11:00 AM.

### **DISCUSSION**

Mr. Pazyra opened the discussion mentioning the previous information that had been emailed to the Committee. Please see that relevant information from that email directly below.

*The total donations received from the Elderly/Disabled Tax Relief inserts in the FY20 tax bills was \$1240. In addition there was \$215 left from FY18 donations, making a total of \$1455 available.*

*In total 16 applications for Elderly/Disabled Tax relief were requested and sent out. Of these 10 applications were completed and returned, 1 was returned as undeliverable and 5 garnered no response. Regarding the undeliverable application I mailed it again and called the applicant. There was no response to the phone call and the application was again returned as undeliverable. Of the 10 applications received, I had to call 4 applicants as they did not submit all the required documents as required in the application. 3 of the 4 responded with the information. Regarding the other applicant, I mailed a request for information and called the applicant twice. There was no response. Accordingly, I ended up with 9 complete applications.*

*Of those 9, 1 applicant is currently receiving a \$400 veteran's exemption and 1 is currently receiving the \$500 41C exemption. Another applicant told me he is receiving an exemption. I checked with the Assessor's Office to see what type of exemption he was receiving (as I did for all the applicants) and that office informed me this applicant was not receiving an exemption. I called this applicant to clarify and had no response. I then called him a second time and again no response. So, I will take him at what he told me that he does get some kind of exemption or tax relief. Given these 3 applicants already have some type of tax relief, my judgment is to use all of the available Elderly/Disabled Tax Relief funds to help those remaining 6 applicants who have no current exemption or tax relief.*

*As I stated in the last email, the attached list details the applicant's names, addresses, income and assets along with my recommended awards.*

The attached spreadsheet shows the recommend awards. (The names and addresses have been removed for these Minutes.) Mr. Pazyra noted an additional \$25 was deposited since the above referenced email making the total funds available \$1480.

Mr. Pazyra then gave a brief overview of the program over the past few years.

A brief general discussion ensued on the future of the program and on a technical matter regarding the proper accounting process.

Ms. Klipp then motioned to approve the \$1480 in awards as listed on the spreadsheet. This was seconded by Mr. Hausammann. The motion was then unanimously approved.

Attached also please find the letter sent out to applicants including the application. All back-up information is at the Veterans' Office.

Lastly, all those who donated to this program were sent a letter acknowledging their donation and thanking them for their concern for our Town's Elderly and Disabled.

## **OLD BUSINESS**

None


## **NEW BUSINESS**

None

## **ADJOURNMENT**

The Committee adjourned at 11:13AM

A True Record to the best of my knowledge-



Michael L. Pazyra  
Committee Chairman

<u>Elderly/Disabled Tax Relief Suggested Awards</u>			<u>Award \$ Available</u>	<u>\$1,480</u>
<u>Name</u>	<u>Address</u>	<u>Annual Income</u>	<u>Assets</u>	<u>Award</u>
		\$38,399	\$1,016	246.67
		\$10,000	\$1,483	246.67
		\$32,274	\$52,566	246.67
		\$17,739	\$1,240	246.67
		\$33,302	\$652	246.66
		\$35,065	\$207	246.66



# Town of Stoughton

Department of Veterans' Services

10 Pearl Street

Stoughton, MA 02072

Tel: 781-341-1300 x9220

Fax: 781-297-2879

Email: [vetagent@stoughton-ma.gov](mailto:vetagent@stoughton-ma.gov)

February , 2020

Dear

Enclosed please find the Elderly and Disabled Property Tax Relief Application that you asked be sent to you. The Taxation Aid Committee has tried to make it as self-explanatory and simple as possible.

**Please feel free to call me directly with any questions.**

The Taxation Aid Committee is currently scheduled to meet sometime during the month of April 2020. Accordingly, I would ask you get the application, along with all required documentation, back to my office by **Tuesday, March 31, 2020**. Priority will be given to those with lower income/assets. Any tax relief provided will be for the property tax bill due on May 1, 2020.

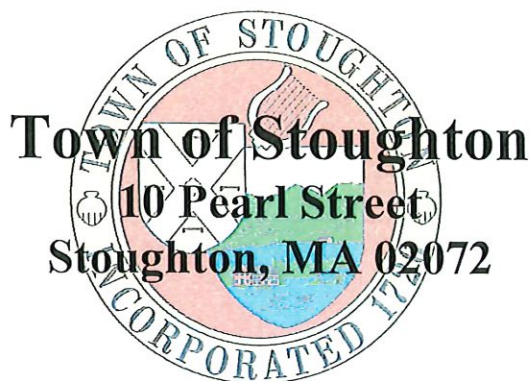
Also, there are other programs/exemptions available for tax relief that you may not be aware of. I have attached 2 of these for reference with this application. When we receive your application we will screen it to see if you are eligible for any other programs or exemptions.

Thank you,



Michael L. Pazyra  
Veterans' Service Officer

MLP/cp0221201



## **Elderly and Disabled Property Tax Relief Application**

Name: \_\_\_\_\_ Date: \_\_\_\_\_

Address: \_\_\_\_\_ Phone: \_\_\_\_\_

To be eligible for the Town of Stoughton Elderly and Disabled Property Tax Relief Fund you must meet the following criteria:

- 62 years of age or older or medical proof of disability.
- Own and occupy your home in Stoughton.
- 300% of the Federal Poverty Level. Single income of no more than \$38,280, married income of no more than \$51,720.
- Single no more than \$40,000 in assets, married no more than \$55,000 in assets. Primary residence is not included. Assets include bank accounts, stocks, bonds, mutual funds, IRA's, CD's, other property, etc.

Please answer the following questions:

Are you 62 years of age or older \_\_\_\_ Are you married \_\_\_\_ or single \_\_\_\_

Are you 62 years of age and disabled \_\_\_\_ Are you married \_\_\_\_ or single \_\_\_\_

Are you the owner of record for the property listed above? \_\_\_\_

Do you meet all of the above outlined criteria? \_\_\_\_

The information that I have provided is true and completed. I understand that misrepresentation or omission of any fact in my application and any other materials provided can be justification for denial of this application.

Applicant's signature \_\_\_\_\_

In order for your application to be processed please include the following documentation with this application (this includes spouses income and assets if married).

\_\_\_\_\_ Copy of your property tax bill for proof of residence.

\_\_\_\_\_ Documentation of trust if applicable.

\_\_\_\_\_ Current proof of all monthly income. This would include, where applicable, Pay stubs, Social Security Award letter(s), Pension statement(s), Investment income, Veterans Administration Award letter(s), etc.

\_\_\_\_\_ Current statement(s) for all assets. This includes Bank Accounts, CD's, IRA's, 401K's, Stocks, Bonds and any other liquid or "cash" assets.

\_\_\_\_\_ Medical proof of your disability if you are under 62 years of age.

Please return completed application with required documentation to:

**Veterans' Office  
10 Pearl Street  
Stoughton, MA 02072**

## **For Reference - Other Property Tax Exemptions.**

### **17D Criteria - \$175 Property Tax Exemption**

- 70 years of age or older.
- Assets of no more than \$40,000.

### **41C Criteria - \$500 Property Tax Exemption**

- 65 years of age or older
- Single annual income of no more than \$24,758, married annual income of no more than \$37,137.
- Single no more than \$40,000 in assets, married no more than \$55,000 in assets.