

From the Holliston Board of Assessors

Property Tax Exemption Helper FY 2024

To Holliston Property Taxpayers

The purpose of this Helper is to assist applicants with completing the Exemption application process. If you would like to know more about Property Tax Exemptions, what options are available, or whether or not you qualify, you can visit <https://www.townofholliston.us/assessors-office/pages/online-forms>

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- Property Tax exemptions must be applied for each and every fiscal year.
 - Property Tax exemption applications are only accepted between **August 1st and April 1st** of this fiscal year.
 - Please complete each application as *thoroughly* and *correctly* as possible.
 - See below and also the other side of this page for a list of documents you must submit depending on the type of exemption.

***The following applies to All Exemptions:**

If your home (domicile) is held in a trust, you must provide this office with a copy of the Trust Instrument in order to process your application. If you have provided this information in previous years or are unsure if your property is held in trust, please feel free to contact our office and we will gladly assist you.

IMPORTANT.

Please note: We cannot review incomplete applications.

If supporting documentation is missing, your application will be considered *Incomplete*. If an application is *Incomplete*, we will contact you immediately after submission.

If you do not submit the information to complete your application within 30 days of being notified, we will move your application to the end of the line. If you do not submit the information by April 1st your application may be deemed denied.

Applications submitted after the April 1st Deadline will not be acted on. Only complete applications can be processed.

We are happy to answer your questions. Please contact us at the Holliston Assessors Office (508) 429-0604!

HOW TO SUBMIT YOUR COMPLETED APPLICATION

You have two options to choose from:

1. Place your completed application(s) and supporting materials in an envelope and mail to the following address.
Holliston Board of Assessors, 703 Washington Street, Holliston, MA 01746 **OR**
2. Submit your application and supporting materials, in-person, to the Assessors Office at the Holliston Town Hall.

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Supporting Documentation requirements for each Exemption Application Type

Clause 22 Veteran Exemption

1. If you have 100% Service related disability, if you are a first time applicant with a Service Related Disability of greater than 10%, or if your disability percentage has changed, you are required to provide a copy of your current Benefit letter from the US Department of Veterans Affairs (VA) in order for us to process your application.

Clause 37 Exemption for the Blind

1. Certificate from the MA Commission of the Blind as of July 1st for current applying year.

Chapter 44B Community Preservation Act (CPA) surcharge Exemption.

1. A copy of each applicant's IRS Income Statement (first 2 pages of Form 1040) from the previous year is required. If you did not file a tax return for the previous year, a signed Affidavit must be submitted with your application instead. You may print an Affidavit at <https://www.townofholliston.us/assessors-office/pages/online-forms> or call the Assessors Office at (508) 429-0604.
2. Please provide documentation of the Out of Pocket Medical Expenses indicated in Section D on the application.

Clause 41C & 17D Senior/Elderly Exemption

1. A copy of each applicant's IRS Income Statement (first 2 pages of Form 1040) from the previous year is required. If you did not file a tax return for the previous year, a signed Affidavit must be submitted with your application instead. You may print an Affidavit at <https://www.townofholliston.us/assessors-office/pages/online-forms> or call the Assessors Office at (508) 429-0604.

Clause 41A Tax Deferral

1. A copy of each applicant's IRS Income Statement (first 2 pages of Form 1040) from the previous year is required. If you did not file a tax return for the previous year, a signed Affidavit must be submitted with your application instead. You may print an Affidavit at <https://www.townofholliston.us/assessors-office/pages/online-forms> or call the Assessors Office at (508) 429-0604.

Clause 18 Hardship Exemption

1. A current Doctor's note outlining your disabilities
2. A copy of each applicant's IRS Income Statement (first 2 pages of Form 1040) from the previous year is required. If you did not file a tax return for the previous year, a signed Affidavit must be submitted with your application instead. You may print an Affidavit at <https://www.townofholliston.us/assessors-office/pages/online-forms> or call the Assessors Office at (508) 429-0604.
3. List of your Assets. Assets include bank accounts (approximate balances) of checking and savings. Stocks, bonds, mutual funds, saving certificates, automobiles and any other real estate you may own.
4. List of your total Household income. Income includes all sources, such as wages, Social Security, pensions, interest and dividends of all household members.
5. List of the monthly expenses of all household members. Such as mortgage payment (please provide a statement), food bills, medical and other insurance costs, utilities (gas, electric heating, fuel, telephone, water bills). Any debts such as car loans, credit card payments, car and homeowners insurance. And any other monthly expense you may have, such as out of pocket medical expenses.