

CLAUSE 41D – PERSON OVER 65 YEARS OF AGE – FISCAL YEAR 2021

Requirements:

You must be 65 years of age as of July 1, 2020.

If single, your gross receipts must be \$23,771 or less.

If single, you must have a whole estate of \$47,540 or less (excluding domicile).

If married, your gross receipts must be \$35,654 or less.

If married, you must have a whole estate of \$65,367 or less (excluding domicile).

You must have resided in MA for the previous 10 years AND you must be domiciled in your home for the past 5 years.

All of the following documents, for each person listed on the deed, must be submitted with your completed application:

Driver's license or birth certificate

Federal and State Income Tax Return for **2019**

If you do not file taxes, please provide a copy of your year end social security statement.

July 2020 copies of bank statements from all your savings and checking accounts

Statements listing value of all other tangible assets such as other real estate, stocks, bonds, mutual funds etc. (as of July 1, 2020)

Statement of any interest and dividends

If the property is held in trust, a copy of the trust document and a list of the beneficiaries.