



TOWN OF EASTHAM

2500 State Highway, Eastham, MA 02642 - 2544
Assessing Department 774-801-3215
assessing@eastham-ma.gov

Senior Exemption Application Checklist

1. First time applicants – birth certificate/driver's license
2. Social security earnings for 2022 – form sent by Social Security
3. Income tax return for 2022 – if no taxes were filed, then please filled out the enclosed affidavit
4. Pensions and Retirement year end statements for 2022
5. Wages or Salaries (W-2) from 2022
6. Interest and dividends earned - 1099-int 1099-div forms for 2022
7. Other earned income, rents, etc. for 2022
8. All bank books, checking accounts, savings, certificates, stocks and bonds, CDs & Certificates, etc. with July 1, 2023 balance. ALL ASSETS ARE NEEDED.

INCOME – if you do not qualify with your income for this clause, check with the Assessor's office for other options – clause 17, TaxAid, etc

- If Single: \$23,079 + \$5,653 (SS/RR allowance): \$28,732
- If Married: \$34,665 + \$8,840 (SS/RR allowance): \$43,145

Examples of income include but are not limited to: wages, salaries, bonuses, commissions, public and private pensions, social security, alimony, child support, lottery winnings, interest and dividend income, capital gains, life insurance proceeds, net income from business or rental property after deduction of related business expenses and losses, public assistance, disability payments, unemployment compensation, workman's compensation, regular cash or financial contributions or gifts from family or other persons outside the household, and any other income.

ASSETS: If Single: \$46,220 If Married: \$63,552

Examples of assets include but are not limited to: cash on hand in checking and savings accounts, value of personal property, stocks, bonds, money market and individual retirement accounts or loans receivable, value of applicant's ownership interest in real estate, and balances of private pensions or 401(k) accounts once the applicant legally qualifies for distribution.

Assets do not include: value of registered motor vehicles, cemetery plots, clothing and household furniture and effects at the applicant's domicile. Depending on the clause, the value of the applicant's domicile of no more than a three-family house may also be excluded.