



Town of Barnstable
Assessing Division
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John T. Curran, MAA
Director of Assessing

SENIOR EXEMPTION (CL 41C) FISCAL 2025 CHECKLIST

Please submit the following required documentation along with your completed application:

1. **Birth Certificate** (only needed the first year)
 - *applicant must be 65 years or older on July 1, 2024*
 2. **Proof of Residence** (active Residential Exemption)
 - *legal MA resident for the last 10+ years and owner/occupant of MA real estate for 5+ years*
 3. **Proof of Income for Calendar Year 2023** (gross income, taxable or not)
 - **SINGLE applicant:** *max. gross income \$36,791.00, after \$5,874.00 Social Security deduction*
 - **MARRIED applicant:** *max. gross income \$53,319.00, after \$8,811.00 Social Security deduction*
 - a. Social Security Benefit Statement (form SSA-1099)
 - b. Federal Income Tax Form 1040 in its entirety (if filed) -OR- a signed & dated statement that you are no longer required to file and why
 - c. Pensions and Retirement Year-End Statements
 - d. Wages or Salaries (W-2)
 - e. All Interest & Dividend Statements (forms 1099-INT, 1099-DIV) and/or a bank letter stating any interest earned, even if zero
 - f. All other income earned (taxable or not)
 4. **Proof of all Assets on July 1, 2024** (all documentation must include the account balance / value on July 1, 2024)
 - **SINGLE applicant:** *max. value of all assets \$73,575.00*
 - **MARRIED applicant:** *max. value of all assets \$101,144.00*
 - a. Bank Account Statements
 - b. Stocks & Bonds Statements
 - c. Real Estate value, excluding the residence (but including any portion which produces income and exceeds four dwelling units)
 - d. Statements for all other assets with a cash value, such as IRA's, life insurance policies, CD's & Certificates, etc.
- Application period begins July 1, 2024 and ends three (3) months after the actual tax bill is issued in December 2024.
- If a joint owner, all other owners must apply and individually meet all income & asset criteria.