

Town of Barnstable

Assessing Division

367 Main Street, Hyannis, MA 02601

www.townofbarnstable.us

Office: 508-862-4022
FAX: 508-862-4722

R. Lane Partridge, MAA
Director of Assessing

MARRIED TAXPAYER – CLAUSE 41C FISCAL YEAR 2024

QUALIFYING AGE

- ✓ You or your spouse must be **65 years or older** before the beginning of the fiscal year starting **July 1, 2023**.

OWNERSHIP AND OCCUPANCY

- ✓ You must have owned and occupied the property on **July 1, 2023**.
- ✓ The property must be your legal domicile on **July 1, 2023**.
- ✓ You must have been a legal resident of the Commonwealth of Massachusetts for at least the last **10 years**.
- ✓ You must have owned and occupied real estate in the Commonwealth of Massachusetts for at least **5 years**.

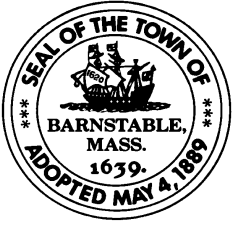
REAL ESTATE AND PERSONAL PROPERTY

- ✓ Both spouses' total assets combined not to exceed **\$97,818.00** excluding value of residence as of **July 1, 2023**. Only the portion, if any, which produces income and exceeds four dwelling units, must be included.

GROSS RECEIPTS

- ✓ Both spouses' total income combined for the **Calendar Year 2022** cannot exceed **\$51,566.00** after subtracting the amount allowed for the *Social Security Deduction* (see below). This includes all sources of income.

Note: A *Social Security Deduction* is allowed only if your gross receipts include payments from Social Security, Railroad, Federal, State, County, Municipal, or District retirement pension plan. The deduction amount for **FY2024 is \$8,538.00**.



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FISCAL YEAR 2024

To process your Clause 41C application, please submit the following information to us:

1. Birth Certificate (only needed the first year)
 2. Proof of Residence (active Residential Exemption)
 3. Proof of Income for **Year Ending December 31, 2022.**
 - a. Social Security Benefit Statement for 2022
 - b. Federal Income Tax Form 1040 (if filed) for 2022
 - c. Pensions and Retirement Year End Statements from 2022
 - d. Wages or Salaries (W-2) from 2022
 - e. All Interest & Dividend Statements- 1099-int 1099-div forms for 2022
If necessary, a letter from your bank stating any interest, even if zero, earned during calendar year 2022
 - f. Any and all other Income Earned in 2022
 4. Proof of all assets on **July 1, 2023**
 - a. Bank Statements that include the 7/1/23 date
 - b. Stocks & Bonds Statements with the 7/1/23 date
 - c. Other Real Estate
 - d. CD's & Certificates, etc.
- You may submit applications for Exemption to the Assessor's Office beginning July 1st.
 - The deadline for filing an exemption is three (3) months after the actual tax bill is issued in December 2023.

If you have any questions, please call the Assessors Office
Monday through Friday between 8:30 AM and 4:30 PM

508-862-4022