



TOWN OF CARLISLE  
FISCAL YEAR \_\_\_\_\_ APPLICATION  
SENIOR MEANS-TESTED EXEMPTION  
*Chapter 263 of the Acts of 2024*

THIS APPLICATION IS NOT OPEN TO PUBLIC INSPECTION  
(See General Laws Chapter 59, § 60)

**APPLICATION DUE TO THE ASSESSOR'S OFFICE BY SEPTEMBER 30, \_\_\_\_\_**

ASSESSED OWNER(S) \_\_\_\_\_

DATE(S) OF BIRTH \_\_\_\_\_ MARITAL STATUS \_\_\_\_\_

PHONE \_\_\_\_\_ E-MAIL \_\_\_\_\_

PROPERTY LOCATION \_\_\_\_\_

MAILING ADDRESS (if different) \_\_\_\_\_

HAVE YOU OWNED THE PROPERTY FOR 10 YEARS OR MORE? .....  YES /  NO

IF NO, list prior property location(s) in Carlisle: \_\_\_\_\_

DO YOU OWN, OR ARE A TRUSTEE/BENEFICIARY, OF ANY OTHER REAL ESTATE? .....  YES /  NO

IF YES, WHERE: \_\_\_\_\_

YOUR ASSETS **TOTAL** AS OF JULY 1, \_\_\_\_\_? \_\_\_\_\_. *Use worksheet on back of this application.*

WAS THE PROPERTY HELD WITHIN A TRUST AS OF JULY 1, \_\_\_\_\_? .....  YES /  NO

IF YES, please attach trust documentation including schedule of beneficiaries.

DID YOU CLAIM THE MA CIRCUIT BREAKER TAX CREDIT FOR TAX YEAR \_\_\_\_\_? .....  YES /  NO

IF NO, a schedule CB must be executed by a tax professional and provided with this application.

**Please attach a copy of your Income Tax Filing and Massachusetts CB (Circuit Breaker) Schedule**

Subscribed this \_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_ under the pains and penalties of perjury.

Signature of Applicant(s): \_\_\_\_\_

*The filing of this application does not stay the collection of your real estate tax obligation. A credit or refund will be applied if the exemption is allowed.*

**ASSESSOR'S USE ONLY**

AGE |  OWNERSHIP/OCCUPANCY |  INCOME |  ASSETS |  GRANTED |  DENIED

EXEMPTION AMOUNT: \$ \_\_\_\_\_ TAX BILL #: \_\_\_\_\_ PARCEL ID: \_\_\_\_\_

SIGNATURES: \_\_\_\_\_

# COMPLETE LIST OF YOUR ASSETS AS OF JULY 1

## FOR MEANS-TESTED REAL ESTATE TAX EXEMPTION

Please list all assets to which you have legal title and access as sole, joint owner or trustee, which contribute to your total worth, excluding your residence. Assets include Real Estate other than your primary residence, bank checking, savings & CD's, brokerage and retirement accounts, bonds, money market certificates, stocks, motor vehicles, RV's, boats, and trailers.

### REAL ESTATE:

<u>LOCATION</u>	<u>ASSESSED VALUATION</u>	<u>AMT. DUE ON MORTGAGE</u>	<u>NET VALUE</u>
_____	_____	_____	_____
_____	_____	_____	_____

### PERSONAL ASSETS – supporting financial statements as of July 1 **must** be included.

Bank Accounts: Institution & Type of Account: (Checking/Savings/CD) Value:

_____	_____
_____	_____
_____	_____

Brokerage and Retirement Accounts: Value:

_____	_____
_____	_____
_____	_____

Motor Vehicles, RV's, Boats & Trailers: (Year, Make & Model) Value:

_____	_____
_____	_____
_____	_____

Other Valuable Personal Property: (i.e., fine art, jewelry, etc.) Value:

_____	_____
_____	_____
_____	_____

**TOTAL VALUE OF PERSONAL ASSETS:** \_\_\_\_\_

### REQUIRED DOCUMENTATION

The following documentation is required as part of your application:

- PROOF OF AGE (*first year only*) |  MOST RECENT FEDERAL/STATE TAX RETURNS
- SCHEDULE CB (*Circuit Breaker*) |  TRUST DOCUMENTATION (*if applicable*) |  VERIFICATION OF ASSETS