



FINANCIAL ASSISTANCE SUMMARY

Programs and Exemptions for Sturbridge Residents

Introduction

This is a summary of some of the programs and exemptions offered by the Town of Sturbridge, to reduce taxes and expenses for seniors, veterans, people with disabilities, income-qualified households and others. We encourage residents to make use of these programs and to refer others who may be eligible. **Participation is confidential.**

For information on these programs and exemptions please contact the Assessor's Office at (508) 347-2503.

Property Tax Exemptions – Sturbridge offers tax exemptions for seniors, veterans, legally blind and other qualifying taxpayers as allowed by state law. Requirements vary for different exemptions. Contact the Assessor's Office for information and assistance. The deadline for filing is April 1 of each year.

Senior Exemption (Clause 41C)

- \$500 exemption
- Must be 70+ years as of July 1st
- Owned and occupied property as domicile in Massachusetts for at least five (5) years
- Domiciled in MA for 10 consecutive years before application date. Does not apply to surviving spouse.
- Income requirements – Under \$30,956.69 Single, Under \$37,392.14 Married
- Total net worth – Cannot exceed \$54,500.25 Single, \$57,824.27 Married

Surviving Spouse, Minor Child and Seniors (Clause 17C ½)

- \$175 exemption
- Must be 70+ years as of July 1st
- Owned and occupied property as domicile in Massachusetts for at least ten (10) years.
- Domiciled in MA for 10 consecutive years before application date.
- No age requirements or Ownership/Domiciliary durations for Surviving Spouse or Minor Child.
- Total assets cannot exceed \$77,857.50

Veterans Exemptions – In order to qualify for these exemptions you must have been:

- Must have been domiciled in Massachusetts 6 consecutive months prior to entering service or must have lived in Massachusetts for not less than two (2) years prior to filing for exemption
- Must occupy the property as domicile on July 1 of the tax year
- Must own the property either solely, joint owner, tenant in common, life estate or held by a trustee, conservator or other fiduciary for the person's benefit.
- Spouses where domicile is owned by veterans spouse and surviving spouse

Clause 22 Exemptions

- \$400 exemption
- Veterans with a service connected disability
- Veterans awarded a Purple Heart
- Spouses where domicile is owned by veterans spouse or surviving spouse

Clause 22A – 22E and Paraplegic (22F)

- \$400 exemption and up
- Clauses for veterans who suffered more serious losses
- Documentation from VA required

Clause 22H – Surviving Parent or Guardian

- Full Exemption
- Injuries received during active service was a proximate cause of death
- MIA with a presumptive finding of death
- Surviving Parent or Guardian must have lived in Massachusetts for not less than five (5) years prior to filing for exemption or the service member must have been domiciled in Massachusetts 6 consecutive months prior to entering service
- Documentation from VA required

Blind Persons Exemption (Clause 37)

- \$437.50 exemption
- Must own and occupy property
- Certificate from Commission for the Blind

Qualifying homeowners age 60+ as of July 1st may earn a property tax discount of up to \$500 for working in a town department doing rewarding work that helps the community. The deadline for filing is December 20 of each year. Please contact the Senior Center for an application or more information.

Senior Tax Work Program

- Property must be in your name
- Primary residence must be Sturbridge
- Income requirements - One person household \$65,550 – Two person household \$74,900.
- Earn minimum wage for hours worked

Veteran Tax Work Program

- Property must be in your name
- Primary residence must be Sturbridge
- Income requirements - One person household \$65,550 – Two person household \$74,900
- Documentation from Veterans Agent
- Earn minimum wage for hours worked

This program is funded by voluntary contributions to support qualifying Sturbridge taxpayers.

Elderly and Disabled Taxpayers Fund

- Application period January 15th – February 15th
- 65+ years of age or have a state recognized disability
- Own and occupy your domicile
- Income requirements - **\$30,956** Single, **\$37,392** Married or if others reside with you
- Your taxes must be current

Clause 41A Tax Deferral

- Qualifying homeowners age 65+ may defer all or part of their property taxes until the property is sold or transferred or upon the death of the taxpayer.

Clause 18A Temporary Tax Deferral

- Granted for financial hardships
- No age requirement
- Can be granted for up to three (3) years – At the end of three (3) years taxes must be paid

Tax Abatements

- Residents who believe that their real estate, motor vehicle or personal property was incorrectly assessed may contact the Assessors to request an abatement through an appeal process. The appeal period varies based on the particular tax.

Veterans Services

- The Veterans Agent provides referrals and assistance to Sturbridge Veterans and their dependents for a wide range of programs and services. Call the Veterans Agent at (508) 347-2044

Circuit Breaker Tax Credit

- Available to certain seniors age 65 years and older
- You may be able to claim a credit on your state income taxes for the real estate taxes paid on your Massachusetts residence

Please talk to your tax advisor regarding the Circuit Breaker Tax Credit

***We hope that this information is helpful.
Questions please contact the Assessor's Office at (508) 347-2503.***