

TOWN OF SHELBURNE
BOARD OF ASSESSORS
51 BRIDGE STREET
SHELBURNE, MASSACHUSETTS 01370
413-625-0300 x. 4
assessors@townofshelburne.com
www.townofshelburne.com

Clause 18- Financial Hardship Policy

Ownership and Domicile Requirements:

1. Applicant must own and occupy the property as of July 1 of the tax year.
2. Applicant must have lived in Massachusetts for the preceding 5 years.

Age and Infirmary Requirements:

1. Applicant must be 60 years old or older or joint owner with a spouse 60 or older as of July 1 of the tax year.
2. Applicant must submit proof of a physical or mental illness, disability or impairment.
3. Applicant's ability to work must be restricted due to the illness.

Income and Asset Requirements:

1. Applicant's annual income cannot exceed 150% of the Annual Federal Poverty Level, as of January 1 of the year before the Fiscal Year.
2. Applicant's liquid assets (cash, stocks, bonds, etc.) cannot exceed \$5,000.00.

Documentation:

Applicants must submit all documentation as required by the Assessors to make a determination on their application, including but not limited to:

- a. Physician's statements
- b. Birth certificate
- c. Federal and State income tax returns
- d. Social Security and pension fund statements
- e. Bank statements
- f. Schedule of assets
- g. Outstanding bills

Exemption Information and Conditions:

- a. The exemption shall be \$500.00 for all who qualify.
- b. The exemption shall typically be allowed only one time per applicant/household. Additional need for the exemption may be considered by the Assessors on a case by case basis.
- c. Applicants must meet with the Assessors to discuss and explain their individual situation.

Approved and voted at their meeting on August 13, 2018 by:

Alan Coutinho

James Richardson

Joseph Mattei

Shelburne Board of Assessors