

THE COMMONWEALTH OF MASSACHUSETTS  
YARMOUTH

FISCAL YEAR 2023

SENIOR 65 AND OLDER

APPLICATION FOR ELDERLY EXEMPTION (41C)

General Laws Chapter 59, Section 5

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

Must be filed with Board of Assessors on or before April 1, 2023

Name of Applicant \_\_\_\_\_  
Property Location: \_\_\_\_\_  
Mailing Address: \_\_\_\_\_  
\_\_\_\_\_

Marital Status: \_\_\_\_\_  
Telephone #: \_\_\_\_\_  
Email: \_\_\_\_\_  
MBLU: \_\_\_\_\_ # of Units: \_\_\_\_\_

Have you been domiciled in Massachusetts for the last 10 consecutive years? YES  NO   
Have you owned and occupied this or any property in Massachusetts for at least 5 years? YES  NO   
Did you own and occupy this property as your domicile as of July 1, 2022? YES  NO   
If yes, were you: sole owner  owner with spouse  co-owner with someone else  (check one)  
Was the property subject to a trust as of July 1, 2022? YES  NO   
*\*If yes, please attach trust documents including schedule of beneficiaries (if not already on file with assessors).*

Applicant's Date of Birth: \_\_\_\_\_ (1st time applicants, please provide proof of age)

**Gross Receipts From all Sources in Preceding Calendar Year (all of 2021)**

**PLEASE PROVIDE COPIES OF ALL SUPPORTING PAPERWORK**

Public Retirement Income (Social Security, Federal/State/Local Govt. Pensions, Railroad)

Applicant \_\_\_\_\_ Spouse (co-applicant) \_\_\_\_\_ Subtotal: \_\_\_\_\_

Social Security Exclusion (Deduction)..... - \_\_\_\_\_  
If filing as Single, deduct \$5,201 Enter your deduction amount on this line.

Subtotal ..... If filing as Married, deduct \$7,802 \$ \_\_\_\_\_

Other Pensions & Retirement Allowances, RMDS..... + \_\_\_\_\_

Wages, Salaries, and Other Compensation ..... + \_\_\_\_\_

Net Profits from Business or Profession ..... + \_\_\_\_\_

Interest and Dividends ..... + \_\_\_\_\_

Other Receipts (Rent, Capital Gain, Etc.)..... + \_\_\_\_\_

TOTALS ..... \$ \_\_\_\_\_

**SEE REVERSE SIDE**

**Personal Estate & Assets**

**Please provide copies of ALL statements showing balances as of  
July 1, 2022**

**BANK ACCOUNTS**

Bank: \_\_\_\_\_ Account Type \_\_\_\_\_

Amount \$ \_\_\_\_\_

Bank: \_\_\_\_\_ Account Type \_\_\_\_\_

Amount \$ \_\_\_\_\_

Bank: \_\_\_\_\_ Account Type \_\_\_\_\_

Amount \$ \_\_\_\_\_

**TOTAL: \$ \_\_\_\_\_**

**STOCKS, BONDS, SECURITIES, ANNUITIES, IRA's,  
and Other Non-Exempt Personal Property**

Type: \_\_\_\_\_

Amount \$ \_\_\_\_\_

Type: \_\_\_\_\_

Amount \$ \_\_\_\_\_

Type: \_\_\_\_\_

Amount \$ \_\_\_\_\_

Type: \_\_\_\_\_

Amount \$ \_\_\_\_\_

**Asset Total: \_\_\_\_\_**

**TOTAL: \_\_\_\_\_**

**Your Signature: \_\_\_\_\_ Date: \_\_\_\_\_**

**DISPOSITION OF APPLICATION (ASSESSORS' USE ONLY)**

Ownership \_\_\_\_\_

GRANTED \_\_\_\_\_

Assessed \_\_\_\_\_

Occupancy \_\_\_\_\_

DENIED \_\_\_\_\_

Exempted Tax \_\_\_\_\_

Status \_\_\_\_\_

DEEMED DENIED \_\_\_\_\_

Adjusted Tax \_\_\_\_\_

Income \_\_\_\_\_

Date Voted/Deemed Denied \_\_\_\_\_

Assets \_\_\_\_\_

Certificate Number \_\_\_\_\_

BOARD OF ASSESSORS

\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_