

SENIOR TAX RELIEF COMMITTEE

June 8, 2016

Attending: Joan Bradford, Linwood Bradford, Steve Colella, Pauline DiCesare, Rebecca MacGregor, Anne Gilbert, and Julie Secord (COA Director).

The meeting was called to order by Rebecca MacGregor at 7:00 PM. There was no public comment.

Ellen Brideau (Director of Assessors) attended our meeting to give us information about the new tax relief plan that Sudbury has enacted. After a three year trial the town has opted to continue the program for another 3 years. The program is for residents over 65 who have lived in Sudbury for at least 10 years. The taxpayer should not pay more than 10% of the Circuit Breaker income plus Circuit Breaker credit from the state. As of 2015 their assets cannot exceed \$850,000 excluding the value of the Sudbury home. The senior can still defer taxes if eligible and receive other statutory exemptions. The limit is that the exemption cannot be more than 50% of their property tax bill. This tax relief to qualifying seniors is shifted to all other property tax payers in town which has been about \$45 per household. The tax exemption in Sudbury ranges from \$17 to \$6500 with an average benefit of about \$3000 per qualifying household. Ellen feels that the Sudbury system is cumbersome and could be simplified if we increased the amount that the town allows for the Circuit Breaker match. Weston doubles the amount of their match of the Circuit Breaker and doubles the qualifying limits of income and assets. If we wanted to propose this change it would have to be done through a local option and approved at Town Meeting. We could work with the Selectmen to co-sponsor the bill. This is something that we can begin to look into.

The minutes of the April 13, 2016 meeting of our committee were approved as written.

Julie reported that the tax work-off program of the COA is in progress with a limit of 65 hours and \$650 per person. The people taking advantage of this program are considered employees of the town with taxes taken out and a W-2 issued at the end of the year.

Julie has found a formatting program for our tax relief cards and will send it to Rebecca. Rebecca will then put the information in the form and we will fine tune it – hopefully at our next meeting.

Linwood and Joan Bradford reported that they went to a meeting of the MCOA in May where they were updated on bills being worked on now by the legislature. One bill is a state sanctioned bill similar to the Sudbury tax relief plan that Carmine Gentile has been working on. Another bill is intended to allow a year to settle property tax issues for tax deferred seniors. Both bills are in the legislative pipeline, but have not been completed.

The next meeting of our committee will be August 10th at 7:00 PM. The meeting was adjourned at 8:40 PM.

Respectfully submitted,

Anne Gilbert (Clerk)