



TOWN OF HAMILTON ~ OFFICE OF THE BOARD OF ASSESSORS  
P.O. Box 429, Hamilton, Massachusetts 01936  
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## STATUTORY EXEMPTION INSTRUCTIONS FOR FISCAL YEAR 2025

**PLEASE RETURN YOUR COMPLETED APPLICATION, PREFERABLY BY OCTOBER 31, 2024,  
ALONG WITH THE FOLLOWING DOCUMENTATION**

- COPY OF BIRTH CERTIFICATE, IF FIRST APPLICATION
- COPY OF DEATH CERTIFICATE IF APPLYING FOR A WIDOW OR WIDOWER EXEMPTION, IF FIRST APPLICATION.
- SOCIAL SECURITY BENEFIT STATEMENT FOR **2023** (FORM SSA-1099) IF APPLYING FOR ELDERLY EXEMPTION (41D or 17E).
- COPY OF **2023** FEDERAL INCOME TAX RETURN.
- COPIES OF DIV. & INTEREST STATEMENTS FOR ALL ACCOUNTS AS OF **July 1, 2024**.
- COPIES OF BANK BOOKS OR STATEMENTS TO VERIFY ALL ACCT. BALANCES AS OF **July 1, 2024**.  
THIS INCLUDES THE FOLLOWING:
  - CHECKING ACCOUNTS (as of 7/1/2024)
  - SAVINGS ACCOUNTS (as of 7/1/2024)
  - SAVINGS BONDS
  - IRA'S & 401K'S
  - CERTIFICATES OF DEPOSIT (CD'S)
  - ANNUITIES
  - STOCKS & MUTUAL FUNDS
- COPIES OF RENT RECEIPTS FOR MULTI-FAMILY HOMES (IF APPLICABLE)
- ANY OTHER INFORMATION REQUESTED ON THE APPLICATION

### **ALL INFORMATION PROVIDED IS CONFIDENTIAL**

- IF PROPERTY IS HELD IN TRUST PROVIDE COPY OF THAT TRUST (IF NOT PREVIOUSLY GIVEN TO BOARD OF ASSESSORS OR IF ANY CHANGES HAVE BEEN MADE TO TRUST SINCE YOUR LAST APPLICATION) - TRUST MUST BE PROVIDED SHOWING THAT YOUR ARE STILL TRUSTEE AND BENEFICIARY OF THAT TRUST.

### **VERY IMPORTANT - PLEASE NOTE:**

**EXEMPTION AMOUNTS WILL BE DIVIDED BETWEEN 3<sup>rd</sup> & 4<sup>th</sup> QUARTER BILLS WHICH ARE DUE FEBRUARY 1, 2025 AND MAY 1, 2025.**

INCOMPLETE APPLICATIONS CANNOT BE APPROVED AND THEREFORE WILL BE RETURNED TO YOU FOR ADDITIONAL INFORMATION. PLEASE BE SURE APPLICATION IS SIGNED.

WE THANK YOU IN ADVANCE FOR YOUR COOPERATION. PLEASE FEEL FREE TO CALL THE ASSESSORS OFFICE IF YOU NEED HELP FILLING OUT THE APPLICATION.

SINCERELY,

HAMILTON BOARD OF ASSESSORS