



**TOWN OF HARVARD TAXATION AID COMMITTEE
 ELDERLY AND DISABLED TAXATION FUND
 SECTION 3-D Guidelines
 FY2009**

A. ELIGIBILITY-The fund was established to provide taxation assistance for the elderly and disabled Harvard residents who are homeowners with limited income and assets. The eligibility criteria for application submission are:

- “Elderly” is defined as a person who is at least 65 on or before the July 1, 2008.
- “Disabled” is defined as a person who is not able to work. The applicant could be receiving SSI, welfare, or retirement income, or may have suffered a loss of income due to illness or accident.
- An applicant must be the titled owner of the property or hold a life estate in the property. If title is held by a trust, the applicant must be both a trustee and a 50% beneficiary of the trust in order to qualify. These conditions apply to elderly or disabled applicants.
- Applicants must have resided in the Town and held title to the taxed property since April 1, 2006, a full calendar prior to the aid grant submission deadline.
- Income shall include all income such as pensions, interest from savings accounts, IRA’s, stocks or bonds, etc.

Total income guidelines include the following:

Single person ----- \$35,000 Couple ----- \$45,000

- Assets, which include stocks, bonds, CD’s, IRAs Annuities, and any tangible liquid asset, will be considered in determining eligibility and aid amount.
- Extraordinary circumstances (e.g., an unusual expense burden) will be considered in the Committee’s deliberations and the decision process. This will provide the Committee with flexibility to address unforeseen situations.

B. APPLICATION PROCESS

- Taxation aid grants will be awarded on an annual basis.
- The application form is available in the Town Treasurer’s office, the Library, online in the Harvard Town Hall website: www.harvard.ma.us or calling the Town Hall at (978-456-4100) on a CONFIDENTIAL basis.
- Applications for FY09 will be due no later than April 30, 2008.
- Your 2007 Federal Income tax submission must accompany this application, if you are required to file.
- All information supplied to the Committee will be held in the strictest confidence.

C. DISTRIBUTION OF FUNDS

- The Funds will be disbursed, based on need, as determined by the Committee. Since the funds are replenished annually through voluntary contributions, the amount disbursed will vary from year to year.
- The taxation aid grant will be deducted equally from each quarterly tax bill.
- Notification of the Committee’s decisions will be mailed to all applicants by May 30, 2008.
- Town residents are invited to contact any member of the committee for clarification of the guidelines or for any related question:

Mary Jo Boynton	978-456-9218	Jim Higgins	978-772-5253
Cynthia Dumser	978-456-8219	Rick Maiore	978-456-8336
Vicki Smith	978-456-4100 (Town Hall # 8:30am-4:00pm Mon-Thurs)		