Town of Harvard
Elderly and Disabled Tax Aid Fund
SECTION 3-D Guidelines for application
FY2018

The fund was established to provide tax assistance for elderly and/or disabled Harvard residents who are homeowners with limited income and assets.

A. **ELIGIBILITY**

- "Elderly" is defined as a person who is at least 65 on or before July 1, 2016.
- "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 percent beneficiary of the trust in order to qualify. These conditions apply to elderly or disabled applicants.
- Applicants must have lived in Harvard and held title to the taxed property since May 15, 2016, a full calendar year before 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 limits: Single - $34,001 Couple - $44,463
- Assets, which include stocks, bonds, CDs, IRAs, Annuities, and any tangible liquid asset, will be considered in determining eligibility and aid amount.
- Extraordinary circumstances (e.g., an unusual expense) 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

- Tax aid grants will be awarded annually.
- 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 by calling Town Hall at 978-456-4100 on a CONFIDENTIAL basis.
- Applications for FY18 will be **due by May 15, 2017**.
- Your 2016 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

- 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 committee's decisions will be mailed to all applicants by June 15, 2017.
- Town residents are invited to contact any member of the committee for clarification of the guidelines or for any related questions:

  Laura Andrews, resident member: 978-456-6961

  Amy Haley, Treasurer, Town of Harvard: 978-456-4100 (ext 318)

  Barbara Kemp, resident member: 978-772-7733

  Ann Taylor, resident member: 978-456-8866

  Debbie Thompson, Council on Aging Director: 978-456-4120

Please return application to: Town of Harvard
Treasurer's Office
13 Ayer Road
Harvard, MA 01451