



**Town of Needham**  
**Taxation Aid Committee / Property Tax Assistance Committee**  
**c/o The Treasurer's and Assessor's Office**  
**Needham Town Hall, 1471 Highland Avenue**  
**Needham, MA 02492**

**ELDERLY AND DISABLED TAXATION FUND and**  
**PROPERTY TAX ASSISTANCE FUND APPLICATION**

Note: You can either click on each field and enter information into that field then print or you can print out the blank document and enter information by hand.

**Applicant Guidelines**

- You must be 60 years or older  
OR
- Have a state recognized disability  
AND
- You must meet income eligibility requirements
- You must be a United States Citizen.
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**Program Guidelines**

- You must pay your tax bill even if you complete this application.
- Application is valid for one year. You must re-apply each year, if seeking relief.

Date of Application: \_\_\_\_/\_\_\_\_/\_\_\_\_

Property Owner(s): (Name(s) as appear on your tax bill) \_\_\_\_\_

Street Address: \_\_\_\_\_

How long have you resided at this address? \_\_\_\_\_

How long have you lived in Needham? \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work/Cell Telephone: \_\_\_\_\_

Are you disabled? \_\_Yes \_\_No. If yes, what is your SSDI number? \_\_\_\_\_

Have you ever applied for or received any exemption for your tax bill? \_\_Yes \_\_No

If yes, please list when: \_\_\_\_\_

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Please complete the following chart for all those who reside at this address.

	Date of Birth	Age	Retired	Working	Unemployed
Name					
Employer					
	Date of Birth	Age	Retired	Working	Unemployed
Name					
Employer					
	Date of Birth	Age	Retired	Working	Unemployed
Name					
Employer					

From the following list, please check those areas where you and all members of your household, 18 years and older, obtain income and attach documentation to substantiate all income. If you file an income tax return, **submission of your most recent 1040, 1040A or 1040EZ will fulfill the income documentation requirement.**

- IRS 1099 Form (Int, Div, Misc)      \$ \_\_\_\_\_
- W2 Forms      \$ \_\_\_\_\_
- Trust Income      \$ \_\_\_\_\_
- General Relief      \$ \_\_\_\_\_
- Social Security      \$ \_\_\_\_\_
- SSI      \$ \_\_\_\_\_
- Unemployment      \$ \_\_\_\_\_
- Pension      \$ \_\_\_\_\_
- VA Benefits      \$ \_\_\_\_\_
- Alimony/Child Support      \$ \_\_\_\_\_
- Property Tax Work Off      \$ \_\_\_\_\_
- Other: \_\_\_\_\_      \$ \_\_\_\_\_
- Other: \_\_\_\_\_      \$ \_\_\_\_\_
- Other: \_\_\_\_\_      \$ \_\_\_\_\_

**Total Yearly Income:**      \$ \_\_\_\_\_

Please list other assets.

Current Value

- Retirement accounts (401k, IRA, etc.)      \$ \_\_\_\_\_
- Investment accounts  
(stocks, bonds, mutual funds CD, etc.)      \$ \_\_\_\_\_
- Other Real Estate      \$ \_\_\_\_\_
- Bank Accounts (checking, savings)      \$ \_\_\_\_\_
- Other assets      \$ \_\_\_\_\_

Please provide the most recent bank statements for all members of the household, 18 years and older.

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How many automobiles do you own?                      Please list below.

	Make	Model	Year	Registered	Unregistered
#1					
#2					
#3					
#4					

**Please list your expenses for a typical month (or year if bills paid annually):**

<b><i>Expenses</i></b>	Monthly	Yearly
Mortgage	\$	\$
Home Insurance	\$	\$
Electric	\$	\$
Gas	\$	\$
Heating Oil	\$	\$
Water/Sewer	\$	\$
Cable/Internet	\$	\$
Phone(s)	\$	\$
Medical (insurance and other expenses)	\$	\$
Prescriptions	\$	\$
Life Insurance	\$	\$
Automobile (gas, loan, insurance)	\$	\$
Food	\$	\$
Clothing	\$	\$
Entertainment	\$	\$
Other Expenses	\$	\$

**TOTAL EXPENSES**                      \$ \_\_\_\_\_                      \$ \_\_\_\_\_

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**Other Information**

If you would like to provide any additional comments on why you are seeking assistance with your tax bill, please include a brief description of your situation below (attach additional sheets if necessary).

The information provided in this application is true and correct to the best of my knowledge.

Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Please print: \_\_\_\_\_

Preparer if other than applicant: \_\_\_\_\_ Phone # \_\_\_\_\_

*If you need further assistance with this form, please call the Needham Assessor's Office at (781) 455-7500 ext 238.*