



**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 – FY23**

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**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.

**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 Phone: \_\_\_\_\_ Work / Cell: \_\_\_\_\_

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 (Please list when: \_\_\_\_\_ )                       No

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

Name	Date of Birth	Age	Retired	Working	Unemployed
Employer					
Name					
Employer					
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: \_\_\_\_\_      \$ \_\_\_\_\_

Please list any other assets and provide supporting documentation.

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

In addition, 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.

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

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

<b>Expenses</b>	<b>Monthly</b>	<b>Yearly</b>
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	\$	\$
Other Expenses	\$	\$
Other Expenses	\$	\$
Other Expenses	\$	\$

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

**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).

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**Before you sign, please make sure the application is filled out completely and all necessary documentation has been attached.**

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

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

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

Email Address: \_\_\_\_\_

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

Email Address: \_\_\_\_\_

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