



Older Adult Property Tax Work-Off Application

Fiscal Year 2025 (July 1, 2024 to June 30, 2025)

Filing Deadline:
August 2nd, 2024

Full Name: _____ Date of Birth: ____/____/____

Address of Residence: _____
Street # Street Name Neighborhood Zip Code

Property Ward & Parcel ID -----

Home Phone: () _____ - _____ Mobile Phone: () _____ - _____

Social Security Number: ----- Work-off filing status: ____ Individual ____ Married

Email (if any): _____ Primary Language: _____

Eligibility Information

As of January 1, 2024, are you 60 years of age or older? ____ Yes ____ No

As of January 1, 2024, are you legally authorized to work in the US? ____ Yes ____ No

As of January 1, 2024, did you own and occupy the above property as your principal residence?
____ Yes* ____ No

As of January 1, 2024, had you owned and occupied the above property as your principal residence for the past 3 years? __ Yes* __ No

**If Yes, and if the property is held in trust, please submit a copy of the trust and schedule of beneficiaries.*

Indicate GROSS INCOME from all sources for Calendar Year 2023

NOTE: Copies of your most recently filed Federal & State Income Tax Returns are required for verification purposes.

	Calendar Year 2023
1. Social Security, Railroad Retirement Benefits, employee Pension or Retirement Allowance from US, Massachusetts or city or town.....	\$ _____
2. Other pensions, retirement allowances and annuities	\$ _____
3. Wages, salaries, tips, other compensation & net profit from business or profession	\$ _____
4. Interest and dividends	\$ _____
5. Gains from sale or exchange of real estate	\$ _____
6. Gains from sale or exchange of other property	\$ _____
7. Rent and royalty income.....	\$ _____
8. Receipts from other sources.....	\$ _____
Note: You must list gross income to qualify	Total Gross Receipts \$ _____

See reverse side for required documents

Required Documents

In order to be considered for the Older Adult Property Tax Work-Off Program, you are required to submit all of the following documents, if applicable. Please check the box next to the documents you are including with your application, noting that financial information for BOTH individuals must be provided if you are filing as married:

- Proof of Age: This may be a copy of your birth certificate, passport, or driver's license.
- 2023 Federal Income Tax Return: If your 2023 federal income tax return has not been filed with the Internal Revenue Service when filing this application, you must provide a copy of your 2022 income tax return. If you did not or do not plan to file an income tax return for 2022 and 2023, then you must submit a letter with this application attesting to having not filed.
- 2023 State Income Tax Return: If your 2023 state income tax return has not been filed with the Commonwealth of Massachusetts when filing this application, you must provide a copy of your 2022 income tax return. If you did not or do not plan to file an income tax return for 2022 and 2023, then you must submit a letter with this application attesting to having not filed.
- 2023 Social Security Letter: If you receive social security benefits, you must include a statement from the Social Security Administration that shows the amount you received in Calendar Year 2023.
- 2023 Pension Letter: If you receive pension benefits, you must include a statement from the pension provider that shows the amount you received in Calendar Year 2023.
- Copy of Trust and Schedule of Beneficiaries: If your principal residence is held in a trust, you must provide a copy of the trust and the schedule of beneficiaries.

Signature

In considering my application for the Older Adult Property Tax Work-Off Program, I hereby authorize the City of Boston Age Strong Commission to make any and all inquiries to any party regarding any income attributable to me in whatever form including, but not limited to, retirement and/or pension benefits from both public and private sources. Under the pains of perjury, I declare that to the best of my knowledge and belief the above information is true, correct and complete.

I understand that I may receive up to \$2,000 to be applied against my City of Boston residential property tax. As a volunteer for the City of Boston, I agree to obey all of the City rules and regulations in regard to my voluntary placement.

Signature

Date

NOTE: Applying does not guarantee acceptance into the program.



Older Adult Property Tax Work-Off Program

Fiscal Year 2025 (July 1, 2024 to June 30, 2025) • Michelle Wu, Mayor

Nicholas P. Ariniello, Esq., Commissioner, Assessing Department

Emily Shea, Commissioner, Age Strong Commission

The Older Adult Property Tax Work-Off Program offers qualified homeowners the opportunity to provide volunteer services to the City of Boston in exchange for a property tax bill reduction of up to \$2,000 per fiscal year (the equivalent of approximately 133.5 service hours). Available positions at Boston City Hall, Boston Public Schools, Boston Centers for Youth & Families, and other municipal offices in Boston.

Program Qualification Criteria

Age	You must be age 60 or over by January 1, 2024
Gross Income Limit	\$62,340 if you are single, \$71,280 if you are married. (60% AMI determined by HUD) Includes Social Security benefits, pensions, other retirement benefits, annuities, wages, salaries, tips, other compensation, net profit from business or profession, interest and dividends, rent and royalty income, gains from sale or exchange of real estate or other property. If married, financial information for both individuals must be provided.
Residency	You must own and occupy residential property in Boston for at least three (3) years.
Property	You must own and occupy your property as a principal residence. If the property is subject to a trust, you must have legal title (<i>be one of the trustees and a beneficiary</i>).

How to Apply

Contact the Age Strong Commission for an application if you believe that you meet the program requirements.

CALL: (617) 635-4366

EMAIL: Agestrong@boston.gov

Application Filing Deadline: August 2, 2024*

Work Completion Date*: November 8, 2024

**Applications take up to 2 weeks to process. Please submit at your earliest convenience to allow for placement and volunteer service.*

What to Submit

Applicants **MUST** provide the following information to meet the program qualification criteria outlined above:

- Proof of Age (e.g. Birth Certificate, Passport or Driver's License)
- 2023 Federal and State Tax Returns
Note: if you are not required to file tax returns, you must submit a signed and dated letter of explanation with your application.
- 2023 Social Security and/or Pension benefit letters.
- If property is held in Trust, copy of Trust and Schedule of Beneficiaries.

NOTE: The maximum abatement amount for this program is \$2,000, the equivalent of approximately 133.5 volunteer hours calculated according to the hourly rate of \$15.00. The amount of the tax work-off credit cannot exceed the total tax due for the fiscal year after any other exemptions have been allowed.

***Upon approval into the program, participants will only receive credit for work performed up to November 8th, 2024 and those credits will be applied against the FY2025 Third Quarter Tax Bill.**

See reverse side for answers to frequently asked questions

FAQ: Older Adult Property Tax Work-Off Program

If I am accepted into the Work-Off Program, when may I begin my volunteer work?

Volunteers who are accepted into the Work- Off Program and who have been placed by the Age Strong Commission may begin their work as early as January 2nd preceding the start of the fiscal year to which the work-off credit will apply.

When will I see the work-off credit reduction on my tax bill?

Program participants may receive up to \$2,000 to be applied against their City of Boston residential property tax bill, which reflects all work hours performed by the November 8th, 2024 deadline.

Work-off credits for Fiscal Year 2025 will appear on the third quarter tax bill that is issued in late December 2024.

What type of work and placement can I expect once accepted into the program?

Duties for available positions within the City. Placements are available at Boston City Hall and other municipal offices in Boston. A background check will be conducted for all placements (photo identification is required).

Additional screening may be required depending on requirements of the City department with which the participant is placed.

Does the work-off tax bill deduction have any income tax implications?

Although you will not be subject to Massachusetts income tax for any amount of the tax work-off, any amount over \$600 may be subject to the Federal income tax. Please consult an income tax professional for more information.

To whom should I send my completed Older Adult Property Tax Work-Off Application?

Once you have completed and signed the Older Adult Property Tax Work-Off Application, checking to ensure that all of the requested information is included, you should send your completed application packet to following address:

Age Strong Commission
Attn: Work-Off Program
Boston City Hall, Room 271
One City Hall Square
Boston, Massachusetts 02201

I have not yet filed my 2023 income tax returns. What financial documentation should I submit with my application?

You are required to provide a copy of your state and federal income tax returns with your work-off application. If you have not yet filed your 2023 income tax returns at the time that you are submitting your application, you must submit your 2022 federal and state tax returns. If you are not filing federal and state income tax returns for 2022 or 2023 and do not have any recent tax return filings to provide, you must submit a signed and dated letter of explanation with your application.

Who can I contact for questions about the Older Adult Property Tax Work-Off program?

For questions about the Work-Off Program, please contact the Age Strong Commission at (617) 635-4366 or agestrong@boston.gov.

THIS IS AN IMPORTANT NOTICE. PLEASE HAVE IT TRANSLATED.

Questa è una notizia molto importante. Vi preghiamo di fare la traduzione.

Este es un aviso importante. Sírvase mandarlo a traducir. Ce message est important. Veuillez faire traduire.

Đây là một bản thông cáo quan trọng. Xin vui lòng thông dịch lại bản thông cáo này.

重要文件，請翻譯成中文

Este é um aviso importante. Por favor providencie a tradução deste aviso.

Es é un avizu importante. Di favor, manda traduzil.

Sa se yon avètisman enpòtan. Tradui li silvouplè.

Это очень важное сообщение. Пожалуйста, найдите переводчика.

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