



Town of Lexington Assessor's Office

Robert F. Lent, Director of Assessing

Tel: (781) 698-4578
Fax: (781) 861-2733
Email: TAO@lexingtonma.gov

Dear Taxpayer:

Enclosed please find your **Clause 17D – Surviving Spouse / Elderly Exemption** Application for Fiscal Year 2017.

The deadline for filing Fiscal Year 2017 Exemptions is 3 months after the first Actual tax bill is mailed out (not during preliminary tax bills). Filing deadline is – April 3, 2017.

Complete the following sections of the application in order for our office to process your application.

1. Section A (Ownership as of July 1, 2016)
2. Section B (Exemption Status as of July 1, 2016)
3. Section C (Value of all property (assets) as of July 1, 2016) – **Asset Limit \$40,000**
4. Section D (Signature)

The following must be enclosed along with your application:

Copies of all property (assets) listing the value on July 1, 2016.

- ❖ Checking Accounts
- ❖ Savings Accounts
- ❖ Certificates of Deposit
- ❖ IRA Account
- ❖ Stocks, Bonds & Savings Bonds
- ❖ Real Estate – Other than your primary residence in Lexington

The Trust Verification Form (if applicable)

For Properties Held in a Trust Only –

Enclose the following (unless already on file with the Assessor's Office):

The applicant must be a Trustee of the Trust **“AND”** also hold a percentage of a Beneficial Interest

- A copy of the entire Trust Document**
- A copy of any amendments made to the Trust within the past 24 months.**
- A copy any amendments made to the Schedule of Beneficiaries**

Please Note;

The Complete Trust, Amendments and Schedules “Must” Be Recorded at the Registry of Deeds

If you have any further questions, please contact our office at 781 – 698 – 4578.

Sincerely,

Town of Lexington
Assessor's Office