



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 41A Deferral** 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.

The Fiscal Year 2017 Fixed Interest Rate is now .66% (simple interest).

You must complete the following sections of the Deferral Application in order for our office to process your application.

1. **Section A (Ownership as of July 1, 2016)**
2. **Section B (Persons with Interest in the property)**
3. **Section C (Gross Income for CALENDAR YEAR 2015) – GROSS INCOME LIMIT \$70,000**
4. **Section D (Signature)**

The following must be enclosed along with your application:

- 2015 Federal Income Tax Return with all Schedules AND/OR**
- 2015 State Income Tax with all Schedules & Circuit Breaker (CB Form) if applicable**
- All 2015 Form 1099's**
- All 2015 W-2 Forms if applicable**

For Properties Held in Trust –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

- The Trust Verification Form (if applicable)**
- A copy of the entire Trust Document (if applicable)**
- A copy of any amendments made to the Trust within the past 12 months**
- A copy of 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.

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