



CITY OF SOMERVILLE, MASSACHUSETTS  
BOARD OF ASSESSORS

**CPA SENIOR / LOW INCOME EXEMPTION INSTRUCTIONS FOR FY 2022**

**Dear Taxpayer:**

The board of assessors will again be accepting applications for statutory exemptions for the current fiscal year 2022.

Before you get started we would like to inform you about the **requirements\* listed on the back side of this letter.**

Together with your application please bring the following documents for all household members:

- An ID that shows your birthdate: driver's license, passport, or birth certificate;
- 2020 Federal Income Tax Return with all schedules;
- 2020 Massachusetts Income Tax return with all schedules, including circuit break if applicable;
- All 2020 Form 1099's and/or tax return schedules/worksheets that identify gross income;
- All 2020 W-2 forms.

For properties held in a trust the applicant must be a trustee and hold a beneficial interest in the trust. Please include a copy of the trust, and a copy of the schedule of Beneficiaries with this application.

The Board of Assessors can only consider timely filed applications. **Applications must be filed with the board of assessors by Friday April 1, 2022, 1230 pm.**

The assessor's office will not consider or hold incomplete applications.

If you have any questions, please visit us at City Hall: Monday-Wednesday 8:30am - 4:30pm, Thursday 830am – 730 pm, Friday 830am – 1230 pm. You can also contact the assessor's office at 617-625-6600 ext. 3100 or email us at [assessing@somervillema.gov](mailto:assessing@somervillema.gov)

With kind regards,

Assessor's Office

**COMMUNITY PRESERVATION SURCHARGE  
LOW/MODERATE INCOME EXEMPTION**

**Exemption Eligibility Requirements  
Fiscal Year 2022**

1. Applicant must own the property as of January 1, 2021.  
Must be (1) sole owner, (2) co-owner, (3) life tenant or (4) Trustee with a sufficient Beneficial Interest in the property under the terms of the trust.
2. Applicant must occupy the property as their domicile as of January 1, 2021.
3. Applicant and each co-owner must have GROSS household Income during the 2020 calendar year as of January 1, 2021 at or below the income limit for that owner's household type and at the number of household members.

***Annual Income Limit by Household Type and Size  
During Calendar Year 2020***

**Source: U.S. Department of Housing and Urban Development Area Wide Median  
Income Data**

**Household Type: Property owned by senior (60 and older)**

Household Size	Annual Income Limit
1	\$84,560.00
2	\$96,640.00
3	\$108,720.00
4	\$120,800.00
5	\$130,464.00
6	\$140,128.00
7	\$149,792.00
8	\$159,456.00

**Household Type: Property owned by non-senior (under age of 60)**

Household Size	Annual Income Limit
1	\$67,648.00
2	\$77,312.00
3	\$86,976.00
4	\$96,640.00
5	\$104,371.00
6	\$112,102.00
7	\$119,834.00
8	\$127,565.00