



The Commonwealth of Massachusetts
House of Representatives
State House, Boston 02133-1054

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House approves local option property tax exemption for seniors

BOSTON – The House of Representatives has given preliminary approval to legislation allowing cities and towns to establish a means-tested property tax exemption program for senior citizens. House Bill 4001 was engrossed by the House on a unanimous vote of 150-0 on July 30, with the support of Representative Todd M. Smola (R-Warren, Ranking Member, Committee on Ways & Means). The bill is modeled after similar tax relief programs offered in Reading, Sudbury and Wayland that are designed to help older residents living on fixed incomes remain in their homes.

Under the local option proposal, communities can offer property tax relief to qualifying seniors, based in part on the amount of the tax credit they were eligible to receive the year prior under the state's Senior Circuit Breaker program. The actual amount of the tax exemption would be set annually by the local governing body.

“This tax program is designed to support seniors that are longtime local residents and mainstays in their community,” said Representative Smola.

House Bill 4001 sets specific guidelines applicants must meet to qualify for a tax exemption. Participation is limited to homeowners who are 65 or older, and have resided in the community for at least 10 consecutive years. If a tax exemption request is filed jointly, the second applicant must be 60 or older, and at least one of the applicants must meet the minimum residency requirement of 10 consecutive years.

Seniors must file annually to receive the exemption, which is subject to approval by the local Board of Assessors. The Board can deny an exemption if it determines the applicant has excessive assets.

House Bill 4001 also contains provisions sun-setting the property tax exemption program after three years. Communities that adopt the local option would be required to vote at three-year intervals to reauthorize the program.

House Bill 4001 now heads to the Senate for further action. For additional information please contact Representative Smola at Todd.Smola@mahouse.gov or (617)722-2100.

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