

CITY OF SALEM, MASSACHUSETTS Assessing Department 93 Washington Street – Room 6 Salem, MA 01970 Tel. (978) 619-5608 Fax (978) 744-2069 Assessor@salem.com

Director of Assessing Stephen Cortes

> BOARD OF ASSESSORS RICHARD JAGOLTA, JR TINA ZELANO ROBERT MILLERICK

FY24 – DOCUMENTATION REQUIRED FOR INCOME QUALIFYING EXEMPTIONS CLAUSE 17D/41C/41A Applications September – April 1st.

Please enclose the following information with your application:

- 1. Copy of your Driver's License or State issued ID
- 2. Income tax returns from the previous year (2022)
- 3. Bank statements, Savings and Checking Accounts as of July 1, 2023
- 4. Current Pension Statements
- 5. Current Social Security Statements
- 6. Current Rental Income Receipts
- 7. *Asset Account Statements
- 8. Trust Documents including schedule of beneficiaries and amendments (If property is in a Trust, the applicant must be a trustee and hold beneficial interest in the property/live at the address)
- 9. First time applicants must provide a copy of birth certificate
- 10.Surviving spouses must provide a copy of death certificate

*Assets include Savings, Certificates of Deposit, IRA's 401K's, Stocks, Bonds, Mutual Funds, Annuities, Property owned, including vehicles and second homes, etc.

Assets DO NOT include the value of your domicile up to a 3-unit home in which one unit you reside.

Do not submit originals, please make copies of your documents before submitting them with your application.

Additionally, as part of the exemption process, the Assessors Office requests an interior & exterior inspection of the property if it has not been inspected within the last 10 years. Please call the office at (978)619-5618 or email DeLinda Dell'Orfano at <u>Ddellorfano@salem.com</u> to schedule a quick (less than 10 minutes) walk through on a mutually agreed upon date and time. Should you have any further questions, DeLinda will be happy to assist you.

Assessing Department: (978) 619-5608

Hours of availability for inspections

Monday – Wednesday = 8:00 - 3:30

Thursday = 8:00 - 6:30

Friday = 8:00 - 11:30

Please know that our assessors are fully Covid vaccinated and observe the current health advised protocol by wearing a face mask is requested and avoiding contact with surfaces as we make the inspection as brief as possible.