

FY26 SENIOR 65+ CLAUSE 41C/D

OTHER EXEMPTIONS YOU MAY BE ELIGIBLE FOR

Blind	Clause 37A
Circuit Breaker	File with state income taxes. Call 800-392-6089 x2
CPA	Community Preservation Act
Deferral	Clause 41A
Senior Work-Off	Volunteer Service
Veteran	Clause 22

For more information visit:

www.wellesleyma.gov/taxrelief

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<https://bit.ly/46yD4AK>

Statutory
Exemption

Taxpayer Information Guide

For more information:

BOARD OF ASSESSORS

525 Washington St.
Wellesley, MA 02482
(781) 431-1019 ext.2272
www.wellesleyma.gov

Monday – Friday
8:00 a.m. to 4:00 p.m.



Town of Wellesley
BOARD OF ASSESSORS

WHAT IS AN EXEMPTION?

An exemption is a release from the obligation to pay all or a portion of the taxes assessed on a parcel of property.

The Clause 41C/D* exemption provides assistance to senior taxpayers that meet age, income, whole estate and residency requirements.

EXEMPTION AMOUNTS

Taxpayers who are eligible for Clause 41C/D will receive a \$1,000.00 reduction in their tax liability. This does not have to be repaid by the property owner. An optional cost of living adjustment was approved by the state (Clause 41D) and adopted by the Town of Wellesley in 2003. Adjustments will be made yearly to both the gross income and asset limits according to COLA, as determined by the Massachusetts Department of Revenue. The COLA adjustment for fiscal year 2026 is 2.9%.

RESIDENCY & OWNERSHIP

REQUIREMENTS

Applicants must have;

- ◆ owned and occupied the property as of July 1
- ◆ owned and occupied any real property in Massachusetts at least 5 years: or a surviving spouse who has inherited the property and occupied it for at least 5 years
- ◆ resided in Massachusetts for the past 10 years
- ◆ beneficial interest the property if in a trust

ELIGIBILITY REQUIREMENTS

To qualify for the exemption, you must have reached the age of 65 as of July 1 of the tax year and, you must meet the following income requirements.

- ◆ A gross income not exceeding:

Marital Status	Income Limit	Limit with Social Security
Single	\$37,806	\$43,642
Married	\$56,712	\$65,605

- ◆ A whole estate (i.e. second home, bank accounts, stocks, bonds and boats), excluding the value of the home, not exceeding:

Marital Status	Whole Estate Limit
Single	\$75,765
Married	\$104,179

NOTE:

Residential properties containing four or more units or commercial units will have a portion of the value of these units included in the whole estate calculation.

If you or your spouse own property jointly with other person(s), you may apply for your proportion of the exemption. However, each joint owner must meet the financial requirements.

**Massachusetts General Laws, Chapter 59, Section 5, Clauses 41C and 41D*

HOW DO I APPLY?

Applications must be filed annually with the Board of Assessors by April 1.

If you filed in a previous year, an application will be automatically mailed to you.

For new applications, contact us at 781-431-1019 x2272 or download the form on our website at www.wellesleyma.gov/taxrelief.

Applicants must include supporting documentation that will help the Board of Assessors make a determination of eligibility. These may include, a birth certificate, evidence of occupancy, income tax returns or statements and other materials.

Please note: filing an application does not mean you can postpone the payment of your tax.

**Massachusetts General Laws, Chapter 59, Sect. 5, Clause 22*