



TOWN OF BROOKLINE NH

Board of Assessors
Po Box 360 – 1 Main Street
Brookline NH 03033
Email kristen@brookline.nh.us
Phone #603-673-8855 ext.216
www.brooklinenh.us

ELDERLY EXEMPTION WORKSHEET

Applications must be received by April 15, 2024

Exemption for the Elderly RSA 72:39a & 72:39b

Qualifications

- At least 65 years of age
- A NH Resident for **3 consecutive years** on or before April 1, 2024
- Applicant must own residential property on or before April 1, 2024
- Must occupy the property as your principal abode for the elderly exemption.
- Married Couples must have been married for **5 consecutive years** on or before April 1, 2024

TOTAL INCOME CANNOT EXCEED (all sources including retirement and social security)

- Single person **\$60,000** per year or Married Couple **\$100,000** per year

TOTAL ASSETS CANNOT EXCEED (Excluding the Value of your principal place of abode)

- Single person **\$750,000** or Married couple **\$750,000**

Exemption amounts if you qualify

Age 65-75 \$120,000 of valuation

Age 75-80 \$ 180,000 of valuation

Age 80 and up \$240,000 of valuation

Documents to be submitted with Application

- Bank statements-current full copies for all checking and savings accounts
- 2023 Federal Tax Return, including all W2's, 1099's, etc.
- 2023 Form SSA 1099- Social Security benefit Statement
- 2023 VA benefits
- 2023 Interest and dividends tax forms
- Current full copies of statements for CD, IRA, 401K, stocks bonds, money market
- Property tax card for any other towns that you own property in.
- Copy of your Trust Declaration if needed along with a PA-33 form
- Copy of Driver license or birth certificate
- Documentation of any fuel, electric, rental or any assistance from others.



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ELDERLY EXEMPTION QUALIFICATION WORKSHEET

Tax ID Map _____ Lot _____

This worksheet is to be completed and submitted along with completed Form PA-29, Permanent Application for Property Tax Credit/Exemptions. All information supplied will be treated confidentially and any supporting documents will be returned upon approval or denial of the application. Please note the following **Income and Asset Limits** when considering submission of your application:

INCOME LIMITS: Single **\$60,000** Married **\$100,000**

ASSET LIMIT: Single **\$750,000** Married **\$750,000**

If you hold a life estate in the property or your property is owned by a trust, you must also submit a completed form PA-33 (Statement of Qualification) **and** submit a copy of the Declaration of Trust, including a list of beneficiaries **or** a completed Certification of Trust per RSA 564-B: 10-1013.

Please print all information clearly:

Applicant's Name: _____

Spouse's Name: _____

Property Address: _____

Mailing Address: _____

Date of NH Residency _____

(Three-year NH residency for elderly exemption, Five-year NH residency for all other exemptions.)

INCOME:

Please list the source and amount of all income for year for both you and your spouse.

SOURCE: (Net income)	Applicant:	Applicant's Spouse:	Supporting Documentation
Social Security:	\$_____	\$_____	_____
Pension & Retirement	\$_____	\$_____	_____
Wages:	\$_____	\$_____	_____
Rental Income:	\$_____	\$_____	_____
Other Income/Annuities:	\$_____	\$_____	_____
Interest Income:	\$_____	\$_____	_____
Other	\$_____	\$_____	_____
Other	\$_____	\$_____	_____
Other	\$_____	\$_____	_____
TOTAL INCOME:	\$_____	\$_____	

If you have filed any of the following – please provide a copy.

1. Interest and Dividend tax return to the State of NH
2. Federal Income Tax Form
3. Any other documents as needed to verify eligibility

_____ Check here if the applicant or applicant's spouse was not required to file a Federal Income Tax Return.

ASSETS:

Please list all assets owned (Self & Spouse)

Savings Accounts or Investments/Certificates: (CD's, Stocks & Bonds, IRA's, Annuities, Travel Trailers, Boats, Antiques, Cars etc.)

[illegible]

All accounts listed above must have a copy of the statement included with this application.

VEHICLES:

- A. Make / Model / Year / Mileage _____
Est. Value \$ _____
- B. Make / Model / Year / Mileage _____
Est. Value \$ _____
- C. Make / Model / Year / Mileage _____
Est. Value \$ _____
- D. Boat / Model / Year _____ Est. Value \$ _____
- E. RV / Model / Year _____ Est. Value \$ _____
- F. Other / Description _____ Est. Value \$ _____
- G. Other / Description _____ Est. Value \$ _____

REAL ESTATE: (not including your primary residence and up to the greater of 2 acres or the minimum single family residential lot size specified in the local zoning ordinance.)

Property Type _____ In Town/State _____
**Provide copy of property tax bill.
Est. Value \$ _____

TOTAL of All ASSETS \$ _____

***If your residence is a 2 Family (includes an ADU) or more and/or has a business run out of it**, only the portion that is the applicant's residence is excluded from the asset limit. The remaining portion of the multi-unit is considered to be an asset, an inspection may be required to determine its value.

_____ Check here if your home is a multi-family home.

_____ Check here if you have a business run out of your home.

I swear, under penalty of perjury, that all the above is a correct and accurate accounting of my financial condition to the best of my knowledge. I further authorize any agency or financial institution to release information about me or copies of my records to any agent of the Town of Brookline. I release all persons whomsoever from any liability resulting from the release of this information.

APPLICANT'S SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

SPOUSE'S SIGNATURE: _____ DATE: _____

PRINTED NAME: _____

TELEPHONE NUMBER: _____

_____ Check here if you would like the Board of Assessors to discuss your application with a friend, family member or caregiver.

Name of that person, relationship _____ phone# _____

Name of that person, relationship _____ phone # _____

Your signature _____ Date _____

THIS QUESTIONNAIRE WILL BE KEPT CONFIDENTIAL EXCEPT THAT THE COMMISSIONER OF THE DEPARTMENT OF REVENUE ADMINISTRATION OR HIS DESIGNEE SHALL HAVE ACCESS TO IT DURING THE DEPARTMENT'S FIVE YEAR ASSESSMENT REVIEW OF ASSESSING PRACTICES (RSA 21-J:11-a).

The Board of Assessors reserves the right check this information annually but not more frequently.

Applications must be received before April 15, 2024 to qualify for the 2024 tax year

Brookline NH has long ago adopted the Elderly Exemption as allowed by RSA 72:39-a.

Elderly Exemption Worksheet

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