

QUALIFICATIONS FY 2024

YOU OR YOUR SPOUSE MUST BE 65 YEARS OF AGE AS OF JULY 1, 2023

YOUR DOMICILE MUST ONLY BE EITHER A SINGLE, TWO, OR THREE-FAMILY AND YOU MUST HAVE LIVED IN MASSACHUSETTS FOR THE PAST TEN YEARS

YOU MUST HAVE OWNED AND OCCUPIED THE PROPERTY OR ANY PROPERTY IN MASSACHUSETTS FOR NO LESS THAN FIVE YEARS

IF SINGLE OR WIDOWED, INCOME CAN NOT EXCEED \$22,791
IF MARRIED, THE TOTAL COMBINED INCOME CAN NOT EXCEED \$34,187

INCOME – ALL GROSS RECEIPTS. YOU MUST STATE ANY SOCIAL SECURITY, PENSIONS, AND ANY OTHER INCOME, WINNINGS, OR RECEIPTS THAT YOU MAY HAVE EARNED OR RECEIVED. AN ANNUAL DEDUCTION, AS DETERMINED BY THE COMMISSIONER OF REVENUE, WILL BE SUBTRACTED FROM YOUR TOTAL GROSS RECEIPTS. YOU MUST ALSO REPORT ANY AND ALL INTEREST FROM BANK ACCOUNTS, STOCKS, BONDS, ETC. The Social Security deduction is based on marital status and full or partial-year social security receipts.

Full Year

Worker: \$5,653

Spouse: \$2,827

Total: \$8,480

Partial Year

Worker: \$476

Spouse: \$241

Total: \$717

MAXIMUM INCOME WITH EXEMPTION: SINGLE: \$28,444 MARRIED: \$42,667

YOUR TOTAL ASSETS CAN NOT EXCEED: SINGLE: \$40,000 MARRIED: \$55,000

ASSETS – ANYTHING OF VALUE: THE TOTAL AMOUNT OF MONEY IN ALL BANKS, RETIREMENT ACCOUNTS (IRA, 401K, 403B, etc.), THE BOOK VALUE OF YOUR CAR, THE FACE VALUE OF STOCKS, BONDS, AND CERTIFICATES, AND THE ASSESSED VALUE OF ANY AND ALL OTHER REAL ESTATE YOU OWN.

THE FOLLOWING DOCUMENTS MUST BE PROVIDED WITH YOUR APPLICATION BEFORE IT CAN BE PROCESSED. PLEASE PROVIDE COPIES ONLY AS DOCUMENTS WILL NOT BE RETURNED. FAILURE TO SUBMIT ALL INFORMATION WILL RESULT IN DENIAL

1. **PROOF OF YOUR AGE** EITHER A BIRTH CERTIFICATE, BAPTISMAL CERTIFICATE, OR DRIVER’S LICENSE.
2. **COPIES OF ALL BANK STATEMENTS**. INCLUDE CERTIFICATES OF DEPOSITS, STOCK/MUTUAL FUNDS, ETC.
3. **COPY OF MOST RECENT STATE & FEDERAL INCOME TAX FILINGS**. IF YOU DO NOT FILE TAXES, YOU MUST CLEARLY STATE SO ON THE APPLICATION.
4. **LETTER FROM YOUR PENSION PROVIDER** INDICATING IF YOUR PENSION CAN BE TRANSFERRED TO A LUMP SUM SETTLEMENT.