

Senior Tax Relief Committee
Wednesday, February 20, 2019
9am
Wayland Town Building

Attending Senior Tax Relief Committee Members:
Joan Bradford, Linwood Bradford, Steve Colella, Pauline DiCesare

Senior Tax Relief Committee Members not in attendance:
Anne Gilbert, Markey Burke

Also in Attendance: Julie Secord, COA Director; Sue Hatton, COA Outreach Coordinator; Mary Antes, Board of Selectmen

Linwood Bradford called the meeting to order at 9am.

The minutes of the Senior Tax Relief Committee held December 12, 2018 were reviewed. With the exception of a spelling correction (Julie Secore to Secord), the minutes were accepted unanimously as amended.

MCOA Task Force Update. There still has not been another MCOA Advisory Task Force meeting since the Wayland Senior Tax Relief Committee last met in Dec. 2018. In the past, MCOA's Executive Board has advocated for the MCOA membership with input from the Task Force. Those meetings had been held in Westwood up until a year or so ago. The MCOA Executive Board however continues to advocate for changed policy with tax deferral rates at the state level. Currently the tax deferral interest rate increases significantly on date of death (from 3.5% to 16%). MCOA has been trying to have the rate increase parallel the grace period with Federal estate returns (12 mos). Whereas the heirs have minimal time to process the passing of their loved one and prepare a home for sale, the consensus at the MCOA meetings seem to parallel our local concerns ... the estate should not be immediately subject to a massive interest rate hike.

The Senior Tax Relief Committee asked the COA Director if there was further information on the structure of the Tax Work Off program under the Valor Act. This would be the last information card to be created in the set of

info cards providing an overview of statutory exemptions for Wayland residents. The Committee suggested a mailing to all Veterans to increase awareness of benefits for which they may be eligible (i.e. benefits to widow(ers) of Veterans, etc. Julie indicated that to do a mailing, it would need to be coordinated through the Veterans Agent, Sarada Kalpee as the Veterans mailing list is not public.

Mary Antes updated the Senior Tax Relief Committee on a MAPC (Metro Area Planning) Committee meeting she had recently attended. She gave an overview of an interesting approach to tax relief ... residents being able to “freeze” their property taxes was discussed. Although it was unclear as to the challenges that such a proposal would encounter, there was sufficient interest from the Chamber of Commerce and others attending the MAPC to explore the formation of a committee to investigate. The Senior Tax Relief Committee thought it to be an interesting proposal as it did not defer vast amounts of money to be paid after death and might appeal to many. Freezing the property taxes could help seniors on fixed incomes to know that their taxes would not be any higher. Only the difference would be deferred. There continued to be many questions that could not be answered (i.e. would this be treated as a deferral with interest, who would be eligible). The impact on Circuit Breaker was also brought up as you need to pay taxes to get CB.

Reverse mortgages were discussed briefly. Steve suggested another consideration for tax relief that only long time residents who had paid taxes into the system for year, would be eligible. Not having a full committee present at the Senior Tax Relief meeting, further discussion was deferred.

A question was raised about proceeding with an article for the Fall WaylandTown Meeting to clarify the language concerning Circuit Breaker (Town match would always parallel the state’s COLA adjusted amount). When this initiative was last attempted, legal recommended the adoption of Clause 57 in the article. However, Clause 57 would treat Circuit Breaker as a statutory exemption and only “one” statutory exemption is allowed. Elders who might have qualified for both CB and an exemption in previous years, would no longer be able to do both. They would have to select the most

advantageous choice. Discussion will be continued about a need for a Circuit Breaker article for Fall Town Meeting, 2019.

Sue Hatton reminded the Senior Tax Relief Committee of the CIRCUIT BREAKER DEADLINE of April 1. Residents will be using their 2017 income tax returns.

The date and time of the next Senior Tax Relief Committee meeting was set for Wednesday, April 10 at 9am.

Meeting was adjourned at 10:10 am.

Submitted by:

Julie Secord, Director

Wayland Council On Aging