

Taxation Aid Committee, Bedford MA

Minutes of Meeting on May 15, 2023

Present: Alex Dizio (Town Treasurer), Rick Rosen (Chair), Sue Swanson (Clerk), Rebecca Neale (Board of Assessors, Chair). **Invited Guest:** Matt Lanefski (Director of the Board of Assessors)

- **Meeting was called to order by Alex Dizio.**
- **Officer Selection:**
 - Rick Rosen selected/confirmed as Chairperson for the committee
 - Sue Swanson selected/confirmed as Clerk for the committee
- **Group discussion on “Taxation Aid Committee Guidelines” draft**
 - Committee thanked Alex and Matt for their work researching other towns’ programs and creating working drafts for Bedford
 - Preliminary discussion of the draft “Taxation Aid Committee Guidelines”
 - Define “elderly” as 60 years of age on or before July 1st of current fiscal year.
 - Define income threshold as that established annually under the MA Senior Circuit Breaker Tax Credit program
 - Timeframe for program: applications to be made available for fiscal year 2025 and due not later than October 1, 2024. Decisions related to distribution of funds to be made by December 31 of the applicable fiscal year.
 - Question raised: Are people who receive property tax deferrals also eligible to apply?
- **Preliminary group discussion on application draft but no decisions made**
- **Preliminary group discussion on donation procedures tabled and no decisions made**
 - Question raised: Should information about the program be included on or with tax bills (as part of the actual tax bill document or as a separate document in the same mailing)?
- **Next meeting**
 - Monday, June 5, at 2pm.
 - Tentative agenda: Finalize committee guidelines. Discuss application form and process. Begin discussion of donation procedures. Set the next meeting date and time.
- **Meeting was adjourned.**
- **Minutes approved on June 5, 2023**
- **Documents shared for review**
 - Town of Bedford. Tax Aid Committee Guidelines
 - Town of Bedford. Tax Aid Application
 - Guidelines and application forms from other towns: Eastham, Framingham, Mendon, Plainville, Seekonk

Submitted by Sue Swanson, Clerk