INFORMATIONAL REQUEST FOR  
FISCAL YEAR 2020 – RESIDENTIAL PROPERTY

PROPERTY IDENTIFICATION:
Assessed Owner: ________________________________
Assessed Location: ________________________________
Contact Person: ________________________________
Phone Number: ________________________________
Mailing Address, City, State, Zip: ________________________________

GENERAL INFORMATION:
This information requisition form is issued pursuant to the authority of the assessors under M.G.L. Ch 59, section 61A.

COMPLETE THIS FORM AND RETURN IT TO THE SHERBORN BOARD OF ASSESSORS, 19 WASHINGTON STREET, SHERBORN, MA 01770 WITHIN 30 DAYS OF RECEIPT IN ORDER TO PRESERVE YOUR RIGHTS. COMPLETE THIS FORM BY PROVIDING ALL INFORMATION REQUESTED. TYPE OR PRINT CLEARLY.

PART ONE: Reason for filing:
A. Overvaluation: The assessment exceeds the full & fair cash value of the property:
1. Indicate the assessed value of the property: $ ________________________________
2. Indicate your opinion of fair cash value: $ ________________________________
3. List the properties (5) in your neighborhood you believe are comparable to your property and their assessed values:
   A1) ________________________________ $ ________________________________
   A2) ________________________________ $ ________________________________
   A3) ________________________________ $ ________________________________
   A4) ________________________________ $ ________________________________
   A5) ________________________________ $ ________________________________
4. For each property listed above, please fill out the detailed listing below:

<table>
<thead>
<tr>
<th>Subject</th>
<th>Street address</th>
<th>Land Ac</th>
<th>Living Area</th>
<th>RM/Bed/Bath</th>
<th>Style/Cond</th>
</tr>
</thead>
<tbody>
<tr>
<td>Comp A1</td>
<td></td>
<td></td>
<td></td>
<td></td>
<td></td>
</tr>
<tr>
<td>Comp A2</td>
<td></td>
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<tr>
<td>Comp A3</td>
<td></td>
<td></td>
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<td></td>
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<tr>
<td>Comp A4</td>
<td></td>
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<tr>
<td>Comp A5</td>
<td></td>
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</tbody>
</table>
B. **Improper Classification:** The property's use on January 1, 2018 was improperly noted on the tax bill (or improperly allocated if the property has more than one use)

1. Indicate present classification (from tax bill) __________

2. Indicate class in which property should be classified:
   - Class One (Residential) ______
   - Class Three (Commercial) ______
   - Class Four (Industrial) ______
   - Multiple Use Class ______

**PART TWO: PHYSICAL DESCRIPTION**

**Design:**
- Bungalow ______ Cape ______ Colonial ______ Contemporary ______
- Antique ______ Ranch ______ Victorian ______ Split Level ______
- Other & name _____________________________________________

**Structure (Condition):**
- Not habitable ______ In disrepair compared to others in neighborhood ______
- Needs minor repairs ______ Comparable to others in neighborhood ______
- Better than neighborhood average ______

**Age:**
Give approximate age of the home __________________________

**Story Height:**
Number of stories __________________________

**Attic:**
- Finished ______ Unfinished ______ None ______

**Garage:**
- Attached ______ Detached ______ None ______
# Of cars __________

**Basement:**
- Full ______ Partial ______ None ______
Give percent of basement that is finished __________________

**Heating & Cooling:**
Number of systems __________
Type of fuel: __________________________
System Type: __________________________

**Condition of Systems (please circle)**
- Heat: New Good Avg Fair Poor
- Electric: New Good Avg Fair Poor
- Plumbing: New Good Avg Fair Poor
- Roofing: New Good Avg Fair Poor
**List the total number of rooms:**

<table>
<thead>
<tr>
<th>Bedrooms</th>
<th>Full Bath</th>
<th>1/2 Bath</th>
<th>Kitchen</th>
</tr>
</thead>
<tbody>
<tr>
<td></td>
<td>Dining</td>
<td>Living</td>
<td>Office</td>
</tr>
<tr>
<td></td>
<td>All others</td>
<td></td>
<td></td>
</tr>
</tbody>
</table>

**Other attachments:**

<table>
<thead>
<tr>
<th>Porches</th>
<th>Patios</th>
<th>Decks</th>
<th>Sun Rooms</th>
<th>Other List</th>
</tr>
</thead>
</table>

**Rehabilitation / New Construction:**

Has there been any new construction or significant rehabilitation performed on the property during the last 5 years? YES _____ NO _____

If YES, list each expenditure made:

<table>
<thead>
<tr>
<th>Year of Remodel/Construction</th>
<th>Description &amp; Cost</th>
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</thead>
<tbody>
<tr>
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</tbody>
</table>

**Purchase Information:** If your property was purchased within the last three years please supply the following information:

Date of Sale: ________________________________
Purchase Price: ________________________________
Down Payment: ________________________________

First Mortgage: Amount: ________________________________ Rate% ________ terms ________
Second Mortgage: Amount: ________________________________ Rate% ________ terms ________

Was there any non-real-estate items included in the sale? Yes _____ No _____
If Yes, list those items & approximate value:
_________________________________________________________________________
_________________________________________________________________________

**Rental & Income Information:** If any part of the property is rented, please complete the following:

<table>
<thead>
<tr>
<th>Unit 1</th>
<th>Unit 2</th>
<th>Unit 3</th>
</tr>
</thead>
<tbody>
<tr>
<td>Furnished?</td>
<td>Yes</td>
<td>No</td>
</tr>
<tr>
<td>Monthly Rent $</td>
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<td></td>
</tr>
</tbody>
</table>

Indicate what is included in the Rent (example heat, electricity, trash pick up etc)

List the yearly expenses for the rental property:

- Heating: __________________
- Insurance: ____________
- Repairs: ____________
- Light & Power: ____________
- Other: ____________

- ____________
SIGNATURE:

I CERTIFY UNDER THE PAINS AND PENALTIES OF PERJURY THAT I AM EITHER THE OWNER OF THE PROPERTY OR THE AUTHORIZED REPRESENTATIVE OF THE OWNER AND THAT ALL OF THE INFORMATION SUPPLIED IN THIS REQUISITION IS TO THE BEST OF MY KNOWLEDGE TRUE & CORRECT.

________________________________________  __________
SIGNED                                      DATE

________________________________________
PRINT FULL NAME
APPLICATION FOR ABATEMENT OF □ REAL PROPERTY TAX
□ PERSONAL PROPERTY TAX

FISCAL YEAR 2020

General Laws Chapter 59, § 59

RETURN TO: Board of Assessors
Must be filed with assessors not later than due date of first actual (not preliminary) tax payment for fiscal year.

INSTRUCTIONS: Complete BOTH sides of application. Please print or type.

A. TAXPAYER INFORMATION.

Name(s) of assessed owner:

Name(s) and status of applicant (if other than assessed owner)

☐ Subsequent owner (aquired title after January 1) on

☐ Administrator/executor.

☐ Lessee.

Mailing address

No. Street City/Town Zip Code

Telephone No. ( )

Amounts and dates of tax payments

B. PROPERTY IDENTIFICATION. Complete using information as it appears on tax bill.

Tax bill no. Assessed valuation $

Location

No. Street

Description

Real: Parcel ID no. (map-block-lot) Land area Class

Personal: Property type(s)

C. REASON(S) ABATEMENT SOUGHT. Check reason(s) an abatement is warranted and briefly explain why it applies. Continue explanation on attachment if necessary.

☐ Overvaluation

☐ Incorrect usage classification

☐ Disproportionate assessment

☐ Other. Specify.

Applicant’s opinion of: Value $

Class

Explanation


FILING THIS FORM DOES NOT STAY THE COLLECTION OF YOUR TAXES. TO AVOID LOSS OF APPEAL RIGHTS OR ADDITION OF INTEREST AND OTHER COLLECTION CHARGES, THE TAX SHOULD BE PAID AS ASSESSED.

THIS FORM APPROVED BY THE COMMISSIONER OF REVENUE.
**D. SIGNATURES.**

Subscribed this ______ day of __________, __________ Under penalties of perjury.

Signature of applicant ____________________________

If not an individual, signature of authorized officer ____________________________ Title ______

(print or type) Name ____________________________ Address ____________________________ Telephone ________

If signed by agent, attach copy of written authorization to sign on behalf of taxpayer.

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**TAXPAYER INFORMATION ABOUT ABATEMENT PROCEDURE**

**REASONS FOR AN ABATEMENT.** An abatement is a reduction in the tax assessed on your property for the fiscal year. To dispute your valuation or assessment or to correct any other billing problem or error that caused your tax bill to be higher than it should be, you must apply for an abatement.

You may apply for an abatement if your property is: 1) overvalued (assessed value is more than fair cash value on January 1 for any reason, including clerical and data processing errors or assessment of property that is non-existent or not taxable to you), 2) disproportionately assessed in comparison with other properties, 3) classified incorrectly as residential, open space, commercial or industrial real property, or 4) partially or fully exempt.

**WHO MAY FILE AN APPLICATION.** You may file an application if you are:
- the assessed or subsequent (acquiring title after January 1) owner of the property,
- the personal representative of the assessed owner’s estate or personal representative or trustee under the assessed owner’s will,
- a tenant paying rent who is obligated to pay more than one-half of the tax,
- a person owning or having an interest or possession of the property, or
- a mortgagee if the assessed owner has not applied.

In some cases, you must pay all or a portion of the tax before you can file.

**WHEN AND WHERE APPLICATION MUST BE FILED.** Your application must be filed with the assessors on or before the date the first installment payment of the actual tax bill mailed for the fiscal year is due, unless you are a mortgagee. If so, your application must be filed during the last 10 days of the abatement application period. Actual tax bills are those issued after the tax rate is set. Applications filed for omitted, revised or reassessed taxes must be filed within 3 months of the date the bill for those taxes was mailed. **THOSE DEADLINES CANNOT BE EXTENDED OR WAIVED BY THE ASSESSORS FOR ANY REASON. IF YOUR APPLICATION IS NOT TIMELY FILED, YOU LOSE ALL RIGHTS TO AN ABATEMENT AND THE ASSESSORS CANNOT BY LAWFULLY GRANT YOU ONE. TO BE TIMELY FILED, YOUR APPLICATION MUST BE (1) RECEIVED BY THE ASSESSORS ON OR BEFORE THE FILING DEADLINE OR (2) MAILED BY UNITED STATES MAIL, FIRST CLASS POSTAGE PREPAID, TO THE PROPER ADDRESS OF THE ASSESSORS ON OR BEFORE THE FILING DEADLINE AS SHOWN BY A POSTMARK MADE BY THE UNITED STATES POSTAL SERVICE.**

**PAYMENT OF TAX.** Filing an application does not stay the collection of your taxes. In some cases, you must pay all preliminary and actual installments of the tax when due to appeal the assessors’ disposition of your application. Failure to pay the tax assessed when due may also subject you to interest charges and collection action. To avoid any loss of rights or additional charges, you should pay the tax as assessed. If an abatement is granted and you have already paid the entire year’s tax as abated, you will receive a refund of any overpayment.

**ASSESSORS DISPOSITION.** Upon applying for an abatement, you may be asked to provide the assessors with written information about the property and permit them to inspect it. Failure to provide the information or permit an inspection within 30 days of the request may result in the loss of your appeal rights.

The assessors have 3 months from the date your application is filed to act on it unless you agree in writing before that period expires to extend it for a specific time. If the assessors do not act on your application within the original or extended period, it is deemed denied. You will be notified in writing whether an abatement has been granted or denied.

**APPEAL.** You may appeal the disposition of your application to the Appellate Tax Board, or if applicable, the County Commissioners. The appeal must be filed within 3 months of the date the assessors acted on your application, or the date your application was deemed denied, whichever is applicable. The disposition notice will provide you with further information about the appeal procedure and deadline.

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**DISPOSITION OF APPLICATION (ASSESSORS’ USE ONLY)**

<table>
<thead>
<tr>
<th>Ch. 59, § 61A return</th>
<th>GRANTED ☐</th>
<th>Assessed value ____________________________</th>
</tr>
</thead>
<tbody>
<tr>
<td>Date sent ____________</td>
<td>DENIED ☐</td>
<td>Abated value ____________________________</td>
</tr>
<tr>
<td>Date returned ________</td>
<td>DEEMED DENIED ☐</td>
<td>Adjusted value ____________________________</td>
</tr>
<tr>
<td>On-site inspection Date ________________________________</td>
<td>Assessed tax ____________________________</td>
<td></td>
</tr>
<tr>
<td>By ___________________</td>
<td>Abated tax ____________________________</td>
<td></td>
</tr>
<tr>
<td>Date voted/Deemed denied ________________________________</td>
<td>Adjusted tax ____________________________</td>
<td></td>
</tr>
<tr>
<td>Certificate No. ____________________</td>
<td>Board of Assessors ____________________________</td>
<td></td>
</tr>
<tr>
<td>Date Cert./Notice sent ____________</td>
<td>____________________________</td>
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</tr>
<tr>
<td>Data changed __________</td>
<td>Appeal ____________________________</td>
<td></td>
</tr>
<tr>
<td>Date filed ______________</td>
<td>Date filed ____________________________</td>
<td></td>
</tr>
<tr>
<td>Valuation ______________</td>
<td>Decision ____________________________</td>
<td></td>
</tr>
<tr>
<td>Settlement __________________</td>
<td>Date: ____________________________</td>
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