

Elderly and Disabled Taxation Aid Committee  
21 November 2019  
Minutes

Present: Ann Taylor (Chair), Barbara Kemp, Debbie Thompson (COA), Lindsay Ames (Treasurer), Marie Sobalvarro

Meeting called to order at 9:35 a.m.

1. Approval of Minutes: On a motion by Barbara and seconded by Marie, minutes of the 5/23/19 and 6/6/19 meetings were approved (4-1-0).
2. Offices to be filled for next year: Ann was nominated as Chair, Barbara as thank-you note writer, Marie as Clerk. (5-0)
3. Treasurer's report: Lindsay updated the committee that the balance to-date was \$4594.47. A discussion ensued regarding the mission of the EDTA, the documentation potential recipients were required to submit, and the process to be followed when a recipient also owed back taxes.
4. Report from the COA Director: Debbie has posted an appeal in the December COA newsletter, will place an appeal on Nextdoor, and will arrange to have the Harvard Press include the EDTA in its list of organizations for charitable donations. Debbie will continue to encourage seniors to file their State Circuit Breaker for the CY2019 tax season.
5. Review of calendar for tasks for CY2020: Committee members agreed that multiple inserts have been effective (generating more donations than the cost of the insertion). The 2-inserts per CY will continue. Ann will update the EDTA Committee calendar and responsibilities, and will redistribute it to committee members. The 'thank you' letter for donors was reviewed and updated with slight edits. Lindsay raised that many residents pay their tax bill online (through Unibank), and offered to explore having a pop-up encouraging folks to support the EDTA. This idea was roundly supported by the committee members.
6. Discussion of senior-tax write-off: A brief update of the CY19 senior tax write-off was presented; it was agreed that individuals could be eligible for both the EDTA assistance and the write-off assistance.
7. The next meeting will be TBD, likely in May 2020. Move to adjourn at 10:40 a.m. (5-0)