

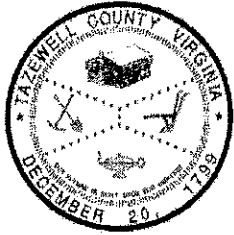
TAZEWELL COUNTY, VIRGINIA  
OFFICE OF THE COMMISSIONER OF REVENUE  
DAVID R. ANDERSON, COMMISSIONER  
135 COURT ST STE 301  
TAZEWELL, VIRGINIA 24651-0020  
PHONE: (276) 385-1235 FAX: (276) 988-5221  
EMAIL: danderson@tazewellcounty.org

## **REAL ESTATE TAX RELIEF FOR THE ELDERLY**

**The Commissioner of Revenue's office administers Tazewell County's Real Estate Tax Relief program for the elderly. You may qualify for tax relief if you meet the conditions below:**

- 1. The title to the property for which the exemption is claimed must be held or partially held on January 1 of the taxable year, by the person or persons claiming the exemption.**
- 2. The applicant must be sixty-five (65) years of age, or older, on or before December 31 of the year immediately preceding the tax year for which exemption is desired.**
- 3. The person claiming the exemption shall file annually, but not later than April 1 of the taxable year on forms supplied by the Commissioner of the Revenue. Please note filing period January 1st to April 1st. Applications received or postmarked after April 1st will not be accepted. You will need to apply every year.**
- 4. The gross combined income of the owners and any relatives living in the dwelling during the preceding calendar year shall not exceed \$30,000; however, the first \$4,000 of income of each relative, other than spouse or owner, shall not be included in such total. Please note application has been revised as of January 1, 2018. You will need to furnish documents or statements requested on application when applying.**
- 5. The net combined financial worth, including equitable interest, as of December 31 of the immediately preceding calendar year, of the owners and of the spouse of any owner shall not exceed \$75,000. This amount shall not include the value of the sole dwelling and is limited to the lot or one acre of land. Please note application has been revised as of January 1, 2018. You will need to furnish documents or statements requested on application when applying.**
- 6. The maximum amount of exemption for any person is \$300 annually.**

**\*\*\*\*\*FOR ASSISTANCE CALL OR VISIT AT THE ABOVE ADDRESS\*\*\*\*\***



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## APPLICATION FOR REAL ESTATE TAX EXEMPTION FOR ELDERLY



**FILING PERIOD JANUARY 1st TO APRIL 1st**

APPLICATIONS RECEIVED OR POSTMARKED AFTER APRIL 1st WILL NOT BE ACCEPTED

**MUST APPLY EVERY YEAR**



APPLICANT: \_\_\_\_\_

ADDRESS: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_ PHONE # \_\_\_\_\_  
 (MUST BE 65 YRS OLD BY DECEMBER 31ST OF THE PRECEDING YEAR)

SPOUSE: \_\_\_\_\_

BIRTH DATE: \_\_\_\_\_ SOCIAL SECURITY # \_\_\_\_\_ PHONE # \_\_\_\_\_

NAME UNDER WHICH PROPERTY IS LISTED AND APPEARS ON THE TAX BILL, IF DIFFERENT FROM THE APPLICANT OR SPOUSE

NAME: \_\_\_\_\_

STREET ADDRESS OF PROPERTY: \_\_\_\_\_ TAX MAP #: \_\_\_\_\_

**1. PLEASE COMPLETE THE FOLLOWING GROSS INCOME STATEMENT BASED ON THE PREVIOUS YEARS INCOME. TOTAL GROSS INCOME SHALL INCLUDE ALL SOURCES FROM ALL RESIDENTS LIVING IN THE DWELLING AND CANNOT EXCEED \$30,000; HOWEVER, THE FIRST \$4,000 OF INCOME OF EACH RELATIVE, OTHER THAN THE SPOUSE OR OWNER, SHALL NOT BE INCLUDED IN TOTAL. ATTACH A COPY OF FEDERAL INCOME TAX RETURN, IF FILED, OR COPIES OF LISTED DOCUMENTATIONS REQUIRED.**

GROSS INCOME	DOCUMENTATION REQUIRED	APPLICANT	SPOUSE	RELATIVES/OTHERS LIVING IN DWELLING
GROSS EARNINGS	W-2, 1099	\$	\$	\$
SOCIAL SECURITY/SSI	1099-SSA or SSI LETTER	\$	\$	\$
ALIMONY	LEGAL DOCUMENTS	\$	\$	\$
PENSIONS: MINERS, VETERANS, BLACK LUNG, ETC...	1099-R	\$	\$	\$
RAILROAD RETIREMENT	RRB-1099/RRB-1099R	\$	\$	\$
INTEREST/DIVIDENDS	1099-INT/OID/DIV	\$	\$	\$
INVESTMENT DISTRIBUTIONS	1099-R	\$	\$	\$
RENTAL INCOME	SCHEDULE E	\$	\$	\$
CAPITAL GAINS	SCHEDULE D	\$	\$	\$
OTHER SOURCES	SPECIFY	\$	\$	\$
<b>TOTAL - GROSS INCOME</b>		\$	\$	\$

\*\*IN ACCORDANCE WITH TAZEWELL COUNTY CODE 18-66D, THE COMMISSIONER OF THE REVENUE SHALL ALSO MAKE ANY OTHER REASONABLY NECESSARY INQUIRY OF THE PERSON SEEKING SUCH EXEMPTION, REQUIRING ANSWERS UNDER OATH, TO DETERMINE QUALIFICATIONS AS SPECIFIED IN THE DIVISION. THE COMMISSIONER OF THE REVENUE MAY, IN ADDITION, REQUIRE THE PRODUCTION OF CERTIFIED TAX RETURNS TO ESTABLISH THE INCOME OR FINANCIAL WORTH OF ANY APPLICANT FOR TAX RELIEF.

2. IS THIS RESIDENCE OCCUPIED BY THE APPLICANT AS THE SOLE DWELLING? \_\_\_\_\_ YES \_\_\_\_\_ NO

3. IS THE APPLICANT OWNER? \_\_\_\_\_ YES \_\_\_\_\_ NO. IF NO, PLEASE EXPLAIN HOW THE APPLICANT HAS AN INTEREST IN THE PROPERTY: \_\_\_\_\_

4. LIST THE NAMES, RELATIONSHIP, AGES, AND SOCIAL SECURITY NUMBERS OF ALL PERSONS WHO OCCUPY THE RESIDENCE FOR EXEMPTION BEING REQUESTED OTHER THAN THE APPLICANT AND SPOUSE.

NAME	RELATIONSHIP & AGE	CLASSIFIED AS A CARE GIVER	SOCIAL SECURITY #	INCOME
				\$
				\$
				\$

5. PLEASE COMPLETE THE FOLLOWING NET COMBINED FINANCIAL WORTH, INCLUDING THE PRESENT VALUE OF ALL EQUITABLE INTEREST AS OF DECEMBER 31ST OF THE PRECEDING CALENDAR YEAR, OF THE OWNERS, & OF THE SPOUSE OF ANY OWNER, EXCLUDING THE VALUE OF THE DWELLING & THE LAND, NOT EXCEEDING ONE ACRE, UPON WHICH IT IS SITUATED. COMBINED FINANCIAL NET WORTH OF THE APPLICANTS CANNOT EXCEED \$75,000. **PLEASE INCLUDE REQUIRED DOCUMENTATION FOR VERIFICATION.**

NET VALUE OF ASSETS	DOCUMENTATION REQUIRED	APPLICANT	SPOUSE
REAL ESTATE ASSESSED VALUES NOT OWNED IN TAZEWELL COUNTY	COPIES OF TAX ASSESSMENT REQUIRED IF ADDITIONAL REAL ESTATE <i>IS NOT</i> IN TAZEWELL CTY		
VEHICLES: YR _____ MAKE _____ MODEL _____ YR _____ MAKE _____ MODEL _____	COPIES OF TAX ASSESSMENT REQUIRED IF VEHICLES ARE ASSESSED IN ANOTHER LOCALITY		
MOBILE HOME: YR _____ MAKE _____ MODEL _____	COPIES OF TAX ASSESSMENT REQUIRED IF MOBILE HOMES ARE ASSESSED IN ANOTHER LOCALITY		
CHECKING ACCOUNT (S)	BANK STATEMENT AS OF 12/31/17	\$	\$
SAVINGS ACCOUNT (S)	BANK STATEMENT AS OF 12/31/17	\$	\$
CERTIFICATES OF DEPOSIT (S)	BANK STATEMENT AS OF 12/31/17	\$	\$
STOCKS/BONDS	ACCT STATEMENT AS OF 12/31/17	\$	\$
IRA(S), MUTUAL FUNDS, ANNUITY, ETC	ACCT STATEMENT AS OF 12/31/17	\$	\$
LIFE INSURANCE POLICY - CASH VALUE	ACCT STATEMENT AS OF 12/31/17	\$	\$
TOTAL - ASSETS		\$	\$

**\*\*ALL INFORMATION ON THIS APPLICATION IS CONFIDENTIAL AND NOT OPEN TO PUBLIC INSPECTION.\*\*** TAZEWELL COUNTY CODE §18-70, ANY PERSON FALSELY CLAIMING AN EXEMPTION UNDER THE DIVISION SHALL BE GUILTY OF A CLASS 1 MISDEMEANOR AS DEFINED IN CODE OF VIRGINIA §18.2-11.

### CERTIFICATE

I, CERTIFY, UNDER THE PENALTIES PROVIDED BY LAW, THAT THIS APPLICATION FOR REAL ESTATE TAX RELIEF IS MY SOLE RESIDENCE, AND THE INCOME AND NET WORTH REPORTED WITH ACCOMPANYING SCHEDULES OR STATEMENTS, ARE TRUE AND CORRECT TO THE BEST OF MY KNOWLEDGE.



SIGNATURE OF APPLICANT: \_\_\_\_\_ DATE: \_\_\_\_\_ 2018  
 SIGNATURE OF SPOUSE : \_\_\_\_\_ DATE: \_\_\_\_\_ 2018  
 SIGNATURE IF SIGNING AS POWER OF ATTORNEY OR A WITNESS: \_\_\_\_\_ 2018

### AUTHORIZATION FOR RELEASE OF INFORMATION

DUE TO VIRGINIA STATE CODE §58.1-3, IF NO ONE IS LISTED BELOW, THE COMMISSIONER OF THE REVENUE OR HIS STAFF WILL NOT BE ABLE TO DISCLOSE THE INFORMATION CONTAINED IN THIS APPLICATION OR SUPPORTING DOCUMENTATION TO ANY PERSON OTHER THAN THE APPLICANT UNLESS A NOTARIZED POWER OF ATTORNEY IS PROVIDED.

I AUTHORIZE THE FOLLOWING INDIVIDUAL TO RECEIVE OR DISCUSS CONFIDENTIAL INFORMATION PERTAINING TO THIS APPLICATION:

NAME OF CONTACT: \_\_\_\_\_ ADDRESS OF CONTACT: \_\_\_\_\_  
 TELEPHONE OF CONTACT: \_\_\_\_\_ EMAIL OF CONTACT: \_\_\_\_\_  
 APPLICANT'S SIGNATURE: \_\_\_\_\_ DATE: \_\_\_\_\_ 2018

**\*\*\*REMEMBER: FILING PERIOD JANUARY 1st TO APRIL 1st/MUST APPLY EVERY YEAR/APPLICATIONS RECEIVED OR POSTMARKED AFTER APRIL 1st WILL NOT BE ACCEPTED\*\*\***