



RENEWAL APPLICATION FILING DEADLINE IS APRIL 1, 2020

**First time applicants must file no later than
October 31, 2020**

The County of Albemarle offers Real Estate Tax Relief to certain qualified elderly and disabled property owners. You may qualify for tax relief if you meet each of the following criteria:

- ✓ **You were the title holder of the property as of January 1, 2020** Properties titled in a life estate may qualify as long as all the eligibility requirements are met. Properties held in a revocable inter vivos trust may qualify if an eligible owner, or an eligible owner and their spouse, hold(s) the power of revocation. Properties held in an irrevocable trust may qualify if an eligible owner, alone or in conjunction with their spouse, possesses a life estate or an estate for joint lives, or enjoys a continuing right of use or support.
- ✓ **You are at least 65 years of age or have been medically determined to be totally and permanently disabled as of December 31, 2019.** The property must be occupied as your sole dwelling. A dwelling jointly held by you and your spouse may qualify if either you or your spouse is 65 or older or is totally and permanently disabled. *Any co-owner(s), other than the spouse, must be 65 or older or totally and permanently disabled, in order for the property to qualify.*
- ✓ **Your combined total income for calendar year 2019 from all sources does not exceed \$69,452.** The income of all residents of the dwelling must be reported in the income with the exception of bona fide tenants or bona fide caregivers of the owner. A \$6,500 deduction will be allowed from the income of each relative living in the home other than the spouse. Disabled applicants may deduct the first \$7,500 of the owner's income.
- ✓ **Your combined total net worth including your spouse, co-owner(s), and their spouse(s) as of December 31, 2019, does not exceed \$200,000** (excluding the value of the dwelling and up to 10 acres of land on which the dwelling is situated) for which the exemption is sought.
- ✓ **Your real estate property seeking tax relief may not be used in a business** (such as a home-based business or renting your property out for income, etc.) that is required to pay an Albemarle County business license tax or fee.

Instructions are continued on the back of this page...

REQUIRED DOCUMENTATION

✓ ***All applicants must provide:***

- ➔ Documentation of each item of Income and Net Worth MUST be included with all applications (See Documentation required column on Parts IV and V).
- ➔ Completed application. The application must be filled out in its entirety.

✓ ***First time applicants must provide:***

- ➔ If you are under 65 years of age, proof of disability is required. Please attach a certification from the Social Security Administration, Railroad Retirement Board, Department of Veteran Affairs, or signed affidavits by two medical doctors licensed in Virginia certifying that you are totally and permanently disabled.
- ➔ Proof of age is required. Please attach a copy of your Driver's License or Birth Certificate.
 - ➔ If your property is jointly owned and the co-owner is deceased, a certified copy of the death certificate is required.

Changes in income, net worth, ownership of the property, or other factors occurring during the current tax year or any prior years in which the relief was received may affect an exemption or may result in the proration of an exemption for the year(s) in which the relief was granted. Please immediately notify the Department of Finance, Revenue Administration Division of any change(s) that may affect your status.

Your Application Cannot Be Approved if...

- The applicant's age or disability requirement is not met
- The applicant's income or net worth limitations are exceeded
- The applicant(s) has/have no ownership interest in the property
- The completed application and ALL supporting documentation is not submitted by the filing deadline

For Office Use Only
Date Received: _____
By: _____
Counter ____ Mail ____
In Person _____

COUNTY OF ALBEMARLE
APPLICATION FOR REAL ESTATE TAX RELIEF
DEPARTMENT OF FINANCE
REVENUE ADMINISTRATION
401 MCINTIRE ROAD – ROOM 133
CHARLOTTESVILLE, VA 22902-4596
2020 APPLICATION

For Office Use Only
Percentage Relief _____
APPROVED (Y/N) _____
DENIED: Income/NetWorth _____
New/Renewal Applicant _____
Processed By: _____

RENEWAL FILING DEADLINE: APRIL 1, 2020
New Applicant Deadline: October 31, 2020

Please complete all information on all pages. Place the word "NONE", "N/A", or "0" on any line that does not apply.

PART I – ELIGIBILITY -- PLEASE MARK THE BASIS FOR YOUR EXEMPTION

AGE: _____ I (or my spouse) was 65 years of age on December 31, 2019. If applying for the first time, please attach a copy of your Driver's License or Birth Certificate.

DISABILITY: _____ I was permanently and totally disabled on December 31, 2019. For those under 65 years of age, proof of disability is required. Please attach a certification from the Social Security Administration, Railroad Retirement Board, Department of Veteran Affairs, or signed affidavits by two medical doctors licensed in Virginia certifying that you were totally and permanently disabled as defined in the Code of Virginia § 58.1-3217: Permanently and Totally Disabled.

PART II – GENERAL INFORMATION

1. APPLICANT (Property Owner / Title Holder)

(a) Name _____
Last
First
Middle

(b) Social Security #: _____ (c) Telephone: _____ (d) Birth Date: ____/____/____

Street Address of Property: _____

Tax Map/Parcel Number of Property: _____

Mailing Address – if different: _____

(e) Do you occupy this residence as your sole dwelling? YES _____ NO _____

(f) Are you applying for tax relief for the first time? YES _____ NO _____

2. List SPOUSE or PROPERTY CO-OWNER(S). List all owners of the property. Use additional sheets if necessary.

(a) Name _____
Last
First
Middle

(b) Social Security #: _____ (c) Telephone: _____ (d) Birth Date: ____/____/____

(e) If spouse or co-owner is deceased, provide date of death: ____/____/____. **First-time applicants must provide a copy of the death certificate.** For renewal applicants, if spouse/property co-owner has died since your previous application, a copy of the death certificate is required with this application.

For additional information, please call (434) 296-5851 (Option 3) or 1-800-828-1120 for TTY.

PART III – COMPLETE THE FOLLOWING INFORMATION FOR ALL PERSONS LIVING ON THE PROPERTY (OTHER THAN APPLICANT AND SPOUSE). Attach additional sheet(s) if necessary

IF NO OTHER PERSONS LIVING ON THE PROPERTY, CHECK BOX:

NAME	RELATIONSHIP TO APPLICANT	SOCIAL SECURITY NUMBER	DATE OF BIRTH	REQUIRED TO FILE INCOME TAX RETURN?	
				Yes	No
				Yes	No
				Yes	No
				Yes	No
				Yes	No

PART IV – TOTAL INCOME

Enter the total income from all sources, for calendar year 2019, of applicant, spouse, co-owners and their spouse(s), and all others living in the dwelling. List each resident's income separately, using additional pages as necessary.

Where there is nothing to report, enter "0".

COPIES OF ALL INCOME DOCUMENTS MUST BE FURNISHED. IF APPLICABLE, ATTACH A COPY OF YOUR FEDERAL INCOME TAX RETURN. IF YOU ARE NOT REQUIRED TO FILE A 2019 TAX RETURN, CHECK HERE:

<i>Income As of December 31, 2019</i>	<i>Documentation Required</i>	<i>Applicant</i>	<i>Spouse / Co-Owner Living in Dwelling</i>	<i>Owner's Relative Living in Dwelling</i>	<i>Occupant Living in Dwelling</i>
Wages, Salaries, Etc.	W-2				
Taxable Interest, Dividends	1099-INT, 1099-DIV				
Alimony Received					
Business Income	Schedule C				
Capital Gains or (Loss)	Schedule D				
Social Security / Railroad / Veterans	SSA-1099				
IRA Distribution / Pension / Annuity	1099-R				
Rental Real Estate, Royalties, Partnerships, S Corporations, Trust, etc.	Schedule E/K				
Unemployment Compensation	1099-G				
Other Income (List type and amount)					
Sub-Total					
*Allowable Deductions: <ul style="list-style-type: none"> o \$7,500 for an owner who is permanently disabled o \$6,500 for each relative who is not the spouse of an owner living in the dwelling 					
TOTAL INCOME					
TOTAL COMBINED INCOME					

*or amount from sub-total, whichever is lower

PART V – ASSETS / NET WORTH

Enter the net financial worth as of December 31, 2019, of the applicant, spouse, co-owner(s) and their spouse(s). Use additional sheets if necessary. **If there is nothing to report, enter "0".**

COPIES OF DOCUMENTATION VERIFYING VALUE OF ASSETS MUST BE FURNISHED.

<i>Value of Assets as of December 31, 2019</i>	<i>Documentation Required</i>	<i>Applicant</i>	<i>Spouse</i>	<i>Co-Owner</i>	<i>Co-Owner's Spouse</i>
Real Estate in Albemarle County (List on page 4 of application)	N/A				
Real Estate not in Albemarle County (List on page 4 of application)	Assessment				
Personal Property (List on page 4 of application)	N/A				
Checking Accounts of Dec. 2019	Account Statement				
Savings Accounts / Certificates of Deposit of Dec. 2019	Account Statement				
Retirement Accounts, IRA's, Deferred Compensation Accounts	Account Statement				
Stocks, Bonds	Account Statement				
Other Assets (Investments, etc)	Account Statement				
Sub-Total					
Less: Value of subject dwelling and up to 10 acres of land on which it is situated					
Total Assets					

COPIES OF DOCUMENTATION VERIFYING BALANCES OF LIABILITIES MUST BE FURNISHED.

<i>Less: Liabilities as of December 31, 2019</i>	<i>Applicant</i>	<i>Spouse</i>	<i>Co-Owner</i>	<i>Co-Owner's Spouse</i>
Notes payable: Balance due on notes, bank loans, etc. <u>Do not</u> include any mortgage balance on the subject property, except to the extent that the subject property is counted as an asset.				
Charge cards/personal loans: Balance due on charge accounts with merchants or charge plans such as VISA or MasterCard				
Other Debts: Other financial obligations not specified above, such as amounts owed to hospitals, doctors, et				
Total Liabilities				
Net Assets (Total Assets Minus Total Liabilities)				
Combined Net Financial Worth				

For additional information, please call (434) 296-5851 (Option 3) or 1-800-828-1120 for TTY.

REAL ESTATE: List the address and location of all real estate owned by the applicant, applicant's spouse, and property co-owners, including any additional lots:

Tax Map/Parcel #	Parcel Address	Locality	# of Acres	Assessed Value
Total Value				

PERSONAL PROPERTY: List all owned vehicles, trucks, trailers, campers, etc., regardless of location

Auto Description	Account #	Assessed Value - Applicant/Spouse's Property	Assessed Value of Co-Owner's Property	Assessed Value of Co-Owner's Property
Total Value				

The completed application and ALL supporting documentation **MUST BE** submitted by the filing deadline, April 1 for renewal applications and October 31 for new applications. Submission of an incomplete application or any application missing required documentation may result in denial of your application.

I, the undersigned applicant, affirm that the foregoing amounts and statements are true, complete, and correct to the best of my knowledge, that I am the owner of the subject property, and that I occupy it as my sole residence.

Signature of Applicant

Date