

**EXEMPTION FOR THE ELDERLY AND DISABLED APPLICATION**

**YEAR 2023**

**COUNTY OF KING GEORGE,  
KING GEORGE, VA**

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

The information required on this application must be filled out in its entirety and returned to the Commissioner Of The Revenue, 10459 Courthouse Dr. Ste.101, King George, VA 22485. Applications must be filed by **March 1st** of the taxable year for which the exemption is applied. Complete all spaces on the application that are applicable. Questions that cannot be answered within the spaces provided may be answered by attaching additional sheets to this application. This exemption is granted on an annual basis and a new application must be filed each year. All information on the application is confidential and not open to public inspection. For any additional information, please do not hesitate to call our office at 540-775-4664.

<b>Applicant:</b> _____		_____	_____
<b>Property Owner: Last Name</b>		<b>First Name</b>	<b>Middle Name</b>
<b>Birth Date:</b> _____ Month/Day/Year	<b>Social Security No.</b> _____		<b>Phone No.</b> _____
<b>Spouse:</b> _____		_____	_____
<b>Last Name</b>		<b>First Name</b>	<b>Middle Name</b>
<b>Birth Date:</b> _____ Month/Day/Year	<b>Social Security No.</b> _____		<b>Phone No.</b> _____
<b>Mailing Address:</b> _____			

Name under which property is listed and appears on the tax bill, if different from the applicant or

Spouse's name: \_\_\_\_\_

Copy from your tax bill: Map and Parcel Number: \_\_\_\_\_  
 E911 Address (if same as SAME)  
 above, write "SAME":

<b>Land Value:\$ 111,400</b>	<b>Improvement Value:\$ 372,000</b>	<b>Total: \$ 483,400</b>
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**RECAPITULATION**

**Office Use Only:**

	<b>Income</b>	<b>Net Worth</b>
<b>Owner</b>		
<b>Owner/Spouse</b>		
<b>Relatives</b>		XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
		XXXXXXXXXXXXXXXXXXXX XXXXXXXXXXXXXXXXXXXX
<b>TOTALS</b>		

**EXEMPTION FOR THE ELDERLY AND DISABLED**

**ITEMIZED SCHEDULE TO BE ATTACHED TO THE APPLICATION FOR EXEMPTION  
OF THE COUNTY OF KING GEORGE REAL ESTATE TAXATION**

**NAME OF OWNER(S)** \_\_\_\_\_

**OWNER'S COMBINED YEARLY GROSS INCOME STATEMENT-**

**My(Our) total combined gross income for the year 2022 from ALL sources is as follows:**

<b>Examples of income which must be reported and proof attached along with the application:</b>	<b>Yearly Gross Income \$\$\$\$</b>
Wages, salaries, bonuses, commissions	\$
Tips and Gratuities	\$
Dividends and other earnings from investments	\$
Civil service, industrial, and other pensions	\$
Retirement compensation, annuities and endowments	\$
Rents royalties from property, patents, copyrights	\$
Profits from business or profession	\$
Profit from sale of real estate, securities, autos, etc.	\$
Your share of partnership profits	\$
Your share of estate of trust income	\$
Alimony and separate maintenance and other support payments	\$
Railroad Retirement Act benefits	\$
Virginia Supplement Retirement Act benefits	\$
State, County, City or town retirement systems benefits	\$
Gifts, inheritances, devises, bequests	\$
Workman's Compensation, insurance, damages for injury, etc.	\$
Life insurance proceeds	\$
Social Security	\$
Farm income, crops, livestock, soil bank and others	\$
Veteran and veteran's family benefits	\$
Unemployment, welfare, etc. benefits	\$
ANY OTHER YEARLY GROSS INCOME – PLEASE SPECIFY:	\$
<b>MY(OUR) TOTAL COMBINED YEARLY GROSS INCOME FOR THE YEAR OF 2022:</b>	<b>\$</b>

**OWNER'S FINANCIAL WORTH STATEMENT**

**My(Our) financial worth, including equitable interests as of the 31<sup>st</sup> day of December, 2022 is as follows:**

<b>YOUR INTEREST MARKET VALUE:</b>	
Cash on hand and in banks, building & loans, savings certificates and trust funds	XXXXXXXXXXXXXXXXXX
including part interest:	\$
Money due me – Examples are mortgages, notes, etc. including part interest:	\$
Value of stocks, bonds, government bonds, etc. including part interest:	\$

**The dwelling in which you reside and five acres of land that the dwelling occupies will be excluded but you must list what is in excess of that including part interests:**

Item:	Title In Whose Name:	Fair Market Value:	Mortgage:

**OTHER ASSETS: (if applicable)**

			\$
			\$
			\$

<b>TOTAL ASSETS:</b>	<b>\$</b>
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I(We), the undersigned, declare this to be a true and accurate statement of my financial condition  
on the 31<sup>st</sup> day of December, 2022.

(If you filed a Federal Income Tax Return last year, you must attach a copy.)

\_\_\_\_\_  
Signature of Owner(s) Date

**EXEMPTION FOR THE ELDERLY AND DISABLED  
ITEMIZED SCHEDULE TO BE ATTACHED TO THE APPLICATION FOR EXEMPTION  
OF THE COUNTY OF KING GEORGE REAL ESTATE TAXATION**

**NAME OF OWNER(S)** \_\_\_\_\_

**NAME OF RELATIVE** \_\_\_\_\_

**NAME OF RELATIVE** \_\_\_\_\_

**RELATIVE'S COMBINED INCOME STATEMENT**

**My total combined gross income for the year 2022 from ALL sources is as follows:**

<b>Examples of income which must be reported and proof attached along with the application:</b>	<b>Yearly Gross Income \$\$\$\$</b>
Wages, salaries, bonuses, commissions	\$
Tips and Gratuities	\$
Dividends and other earnings from investments	\$
Civil service, industrial, and other pensions	\$
Retirement compensation, annuities and endowments	\$
Rents royalties from property, patents, copyrights	\$
Profits from business or profession	\$
Profit from sale of real estate, securities, autos, etc.	\$
Your share of partnership profits	\$
Your share of estate of trust income	\$
Alimony and separate maintenance and other support payments	\$
Railroad Retirement Act benefits	\$
Virginia Supplement Retirement Act benefits	\$
State, County, City or town retirement systems benefits	\$
Gifts, inheritances, devises, bequests	\$
Workman's Compensation, insurance, damages for injury, etc.	\$
Life insurance proceeds	\$
Social Security	\$
Farm income, crops, livestock, soil bank and others	\$
Veteran and veteran's family benefits	\$
Unemployment, welfare, etc. benefits	\$
ANY OTHER YEARLY GROSS INCOME – PLEASE SPECIFY:	\$
MY YEARLY COMBINED GROSS INCOME FOR THE YEAR OF 2022:	\$
	MINUS-\$2,500.00
MY TOTAL YEARLY COMBINED GROSS INCOME FOR THE YEAR OF 2022:	\$

I, the undersigned, declare this to be a true and accurate statement of my financial condition  
on the 31<sup>st</sup> day of December, 2022.

(If you filed a Federal Income Tax Return last year, you must attach a copy.)

**Relative's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Relative's Social Security Number** \_\_\_\_\_

**Relative's Signature** \_\_\_\_\_ **Date** \_\_\_\_\_

**Relative's Social Security Number** \_\_\_\_\_

**EXEMPTION FOR THE ELDERLY AND DISABLED**

**ITEMIZED SCHEDULE TO BE ATTACHED TO THE APPLICATION FOR EXEMPTION  
OF THE COUNTY OF KING GEORGE REAL ESTATE TAXATION**

**1.** Is this dwelling occupied by the applicant as the sole dwelling?                      YES                      NO

**2.** Is the applicant(s).....Owner    Partial Owner

If partial ownership, explain how the ownership is legally held and the proportion owned by applicant.

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**3.** List the names, relation, gross income (if any), ages and social security numbers of all persons related to the applicant(s) who occupy the above dwelling:

Name	Relation	Income		Age	Social Security No.#
		Yes	No		

COUNTY OF KING GEORGE,  
STATE OF VIRGINIA

THIS IS TO CERTIFY that I(we) have read a copy of the King George County Ordinance, that I(we) understand that I(we) must file annually; that I(we) have listed the names of all relatives occupying my(our) sole domicile; that the total combined net worth and the total combined gross income from all sources does not exceed the limits listed in the King George County Ordinance, and that changes in respect to income, financial worth, ownership of property or other factors occurring the taxable year for which this affidavit is being filed shall nullify any exemption for the current taxable year and the taxable year immediately following.

OATH – I(We), the undersigned applicant(s), do swear (or affirm) that the foregoing figures and statements are true, full and correct to the best of my knowledge and belief.

**Signature of Owner(s) of Dwelling** \_\_\_\_\_ **Date** \_\_\_\_\_

Sworn (or affirmed) to before me this \_\_\_\_\_ day of \_\_\_\_\_, 20\_\_\_\_.

\_\_\_\_\_  
Signature of Notary Public or Other Officer Administering Oath                      (i.e. Commissioner of the Revenue Office Signature)

**KING GEORGE COUNTY**  
**EXEMPTION FOR THE ELDERLY AND DISABLED PROGRAM**

**BELOW ARE “SOME” EXAMPLES OF INCOME WHICH MUST BE REPORTED**  
**EACH YEAR. PROOF OF THE FOLLOWING MUST BE ATTACHED TO YOUR**  
**APPLICATION WHEN FILED**  
**IF APPLICABLE:**

**\*\*\*Social Security Statement = 1099 Statement Reflecting amount received previous year**

**\*\*\*Retirement Statement**

**\*\*\*Income Tax Return Filed This Year**

**\*\*\*1099**

**\*\*\*W-2**

**\*\*\*Checking Account Statement = January Statement Reflecting December 31<sup>st</sup> Balance.**

**\*\*\*Savings Account Statement = January Statement Reflecting December 31<sup>st</sup> Balance.**

**\*\*\*Any cash on hand**

**\*\*\*Any rents or mortgages due you**

**\*\*\*CD**

**\*\*\*401K**

**\*\*\*IRA**

**\*\*\*Must list all Personal Property (motorcycles, motor homes, campers, utility trailers, boats, vehicles, pick up trucks, etc.)**

**\*\*\*Must list all Real Estate owned in this county and/or another county or state**

**\*\*\*Must list all Personal Property owned in this county and/or another county or state**

**\*\*\*If you may have a relative living with you, you must list their name, social security number, relationship to you, yearly gross income and provide proof of the relative's income.**