



CITY OF WILLIAMSBURG

DEPARTMENT OF FINANCE

Real Estate Tax Deferral for the Elderly and Disabled

Fiscal Year 2024 (7/1/2023 – 6/30/2024)

Deadline to file: City Code 18-54, no later than December 1, 2023

City of Williamsburg Code Section 18-54 allows the deferral of taxes on real property owned by and occupied as the sole dwelling of persons who are at least 65 years of age or permanently and totally disabled, subject to certain income and net worth limitations. By signing and dating this application you acknowledge that you have read and understand City of Williamsburg Code Section 18-54. Please follow the instructions for filling out this form.

Section 1. Owner(s) Information as stated on the Deed (PLEASE PRINT CLEARLY)

Name of Owner _____ Age _____ Date of Birth _____

Name of Spouse _____ Age _____ Date of Birth _____

Property Address of Sole Dwelling _____

Owner phone number _____

Section 2. Relatives living at the above address (If none, please write "none" in the space below)

| | Name | Relationship to Owner |
|------------|------|-----------------------|
| Relative 1 | | |
| Relative 2 | | |

Section 3. Total Annual Combined Gross Household Income (From 1/1/2022 to 12/31/2022)

| Income from: | Owner | Spouse | Relative 1 | Relative 2 |
|-------------------|-------|--------|------------|------------|
| Wages | | | | |
| Social Security | | | | |
| Pensions | | | | |
| Annuity | | | | |
| Interest (Income) | | | | |
| Dividends | | | | |
| Rental Income | | | | |
| Other _____ | | | | |

Total Annual Combined Gross Household Income _____ (See Instructions)

Section 4. Net Worth Assets (as of 12/31/2022)

| | Owner | Spouse |
|-------------------------|-------|--------|
| Checking Accounts | | |
| Savings Accounts | | |
| CDs | | |
| Stocks | | |
| Bonds | | |
| Insurances (Cash Value) | | |
| Other _____ | | |

Section 4a. Real Estate Owned (Other than Sole Dwelling)

Locality/Jurisdiction: _____
Parcel ID: _____
Property Address: _____
Assessed Value: _____

Section 4b. Personal Property (Auto, Boat, Camper and similar)

| Type | Year | Make | Model | Assessed Value |
|-------------------|------|------|-------|----------------|
| Vehicle 1 | | | | |
| Vehicle 2 | | | | |
| Boat | | | | |
| Trailer/Camper/RV | | | | |
| Other _____ | | | | |

Total Net Worth Assets (Items 4, 4a, 4b) _____ (See Instructions)

Section 5. Required Attachments to the application

- A. Copies of the most recent Federal income tax returns for each applicant.
- B. If under 65 years of age and applying based on permanent and total disability, please attach certification documents as prescribed in paragraph (4) of Sec. 18-54, City Code.
- C. Documents that support your Total Annual Combined Gross Household Income Section 3.
- D. Documents that support your Net Worth Assets Section 4, 4a, 4b.
- E. Signed and dated copy of Instructions for completing fiscal year 2024 Real Estate Tax Deferral Application

Notwithstanding a deferral of real property taxes, Applicant is responsible to meet any requirements imposed as part of any Promissory note or Deed of Trust. It is the applicant’s responsibility to confirm that any deferment granted hereunder will be recognized by the applicant’s mortgage lender prior to submitting the application. The City of Williamsburg makes no representation as to affect the deferral of real property tax payments may have under any Deed of Trust or Promissory Note. Applicants are encouraged to contact their mortgage lender prior to applying for the City’s Real Estate Tax Deferral program. Failure of a mortgage lender to recognize the City of Williamsburg’s Tax Deferral program is a matter solely between the applicant and the mortgage lender.

I understand and hereby make application for deferment of fiscal year 2024 real estate tax as provided by Section 18-54 of the Code of the City of Williamsburg, Virginia. I certify, under oath, that the above information is true and correct to the best of my knowledge and that I have read City of Williamsburg Code Section 18-54. Falsifying or omitting information requested on the application will result in your application being denied or revoked.

Applicant Signature Date Applicant Signature Date

Please return the completed application to the City of Williamsburg Real Estate Assessment Office, 401 Lafayette Street, Williamsburg, VA 23185 by December 1, 2023.

For Office Use: Approved _____ Denied _____
Applicant # _____ Date received _____ Received by _____