Before sending in your application to be considered for Real Estate Tax Relief, you MUST WAIT to receive your 2021 Social Security 1099 Benefit Statement OR request a Statement from the Social Security Office showing the total amount of benefits that you received in 2021. We can no longer obtain this information for you.

You MUST also wait to receive your Bank Statements, etc. to show the balance in your account(s) as of December 31, 202.

The Deadline for submitting applications with required Signature(s) along with all Statements is February 28, 2022 Also ALL DELINQUENT REAL ESTATE TAXES MUST BE PAID BY DECEMBER 31, 2021.

TAX RELIEF

FOR THE ELDERLY & DISABLED

GENERAL INFORMATION

Halifax County offers tax relief to homeowners who qualify and file an annual application with the Commissioner of The Revenue. The tax relief reduces the "real estate tax" on a home plus up to one acre of land. Any land, which the homeowner owns that exceeds one acre, is not eligible for tax relief. If a taxpayer owns more than one home, the tax relief will be applied to the primary residence only. Halifax County's tax relief program <a href="https://does.not.include.com/homeowner.com/homeo

HOW TO QUALIFY

In general, a homeowner must meet an AGE qualification, an INCOME test and NET WORTH test. In order to qualify, a homeowner must

- be at least 65 years of age,
- have an annual "household" income of \$22,000 or less, and
- have a net worth that does not exceed \$60,000.

The INCOME test includes "all income" from all people who live in the home. The applicant may exclude the first \$8,500 of income of each relative who also lives in the home. When considering the income test, you should include earned wages, pension payments, social security, interest, dividends, etc.

The NET WORTH test includes the value of your assets such as stocks, bonds, savings & checking accounts, rental properties, land value in excess of one acre, vehicles, farm equipment, etc. It DOES NOT include the value of your home and up to one acre of land that it sits on.

In order to qualify you must meet each of the three tests described above. ONE EXCEPTION is that if you are not at least 65 years old, but you are permanently and totally disabled, you may still qualify as long as you can provide our office with a letter from the Social Security Office indicating that you are permanently and totally disabled and unable to engage in any substantial gainful employment because of your disability. You must still meet the income and net worth tests.

HOW TO APPLY

If you think you qualify for Halifax County's tax relief program, please contact The Commissioner of The Revenue's Office at (434) 476-3314 for an application. <u>In addition to the application and financial statements please include copies of any W-2 wage statements, bank statements, 1099-Div, 1099-Int, 1099-Misc, 1099-R, and SSA-1099 social security statements for the past tax year. Mail your application to us by February 28, 2022 If you qualify, your next real estate tax bill will reflect the amount of tax relief for which you are eligible, and any remaining taxes due on this bill must be received on or before the deadline. Also, any delinquent taxes on real estate must be paid before you can receive any tax relief. If you have additional questions, please call our office at (434) 476-3314.</u>

2022 HALIFAX COUNTY COMMISSIONER OF THE REVENUE P O BOX 1847 HALIFAX, VA 24558

FOR OFFICE USE ONLY

DATE RECEIVED DATE ISSUED MAP NUMBER

AFFIDAVIT AND APPLICATION FOR REAL ESTATE TAX RELIEF FOR CERTAIN ELDERLY AND DISABLED PERSONS

The information required on this application must be filled out in its entirety and returned to the Commissioner of The Revenue's office. Application must be filed by Feb. 28 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. Read requirement for exemption on the back page. For additional information, please call (434) 476-3314.

APPLICANT					
(PROPERTY OWNER	R)Last Name First	Midd	lle		
ADDRESS					
BIRTHDATE	SOCIAL SECURITY NO:				
Month	n/Day/Year				
PHONE NUMBER	<u>:</u>				
SPOUSE					
	Last Name First	Midd	le		
BIRTHDAY	SOCIAL S	ECURITY NO):		
Month	n/Day/Year				
Name(s) under which proper NAME(S)	erty is listed and appears on the tax bill	, be sure to note join	t ownership if applicable.		
Street Address of Prop	erty				
Tax Map and Parce	el Number Copy from Tax	Bill:			
	FOR OFFICE USE ONLY				
	INCOME =		NET WORTH =		
	Percentage of relief	_	\$		
TAX YEAR	Current year Tax D	ue	\$		
	Amount of Relief Granted \$		\$		
	Ralance to be Paid I	hy Taxnaver	\$		

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

2. Is the applicant?

ELDERLY

DISABLED

3. Is the applicant?

SOLE OWNER

PARTIAL OWNER

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

AFFIDAVIT

I certify under the penalties by law, that this application for Real Estate Tax Relief for the Elderly and Disabled, including any accompanying schedules or statements, to the best of my knowledge and belief is true, correct and complete.

Date	Signature	
Date	Signature	

COUNTY OF HALIFAX COUNTY REAL ESTATE TAX RELIEF FOR THE ELDERLY AND DISABLED REQUIREMENTS FOR EXEMPTION

- 1. The title of the property for which exemption is claimed must be held or partially held, on January 1 of the taxable year, by the person or persons claiming exemption.
- 2. The person or persons claiming exemption must be 65 years of older, or permanently and totally disabled, on December 31 of the year immediately proceeding the taxable year. Totally Disabled applicants under 65 must attach either a certificate by the Social Security Administration, or if applicant is not eligible for Social Security, a sworn affidavit by (2) medical doctors licensed to practice medicine in the Commonwealth to the effect that such person is permanently and totally disabled.
- 3. The dwelling on the property for which exemption is claimed must be occupied as the sole dwelling of the person or persons claiming the exemption.
- 4. The total combined income during the immediately preceding calendar year from all sources of the owner's of the dwelling living therein, and the owners' relatives living in the dwelling, shall not exceed twenty two thousand, provided, that the first eight thousand five hundred dollars of income of each relative, other than spouse, of the owner or owners, who is living in the dwelling shall not be included in such total.
- 5. The net combined financial worth, including equitable interests, as of the thirty-first day of December of the immediately preceding calendar year, of the owners, and of the spouse of any owner, excluding the value of the dwelling and the land, not exceeding one acre, upon which it is situated, shall not exceed sixty thousand dollars.
- Annually, and not later than February 28 of the taxable year, the person or persons claiming an
 exemption must file a Real Estate Tax Exemption application with the Commissioner of The
 Revenue.

PENALTIES FOR VIOLATION

- (a) Any person who shall falsely claim the exemption provided for in the ordinance shall pay to the treasurer one hundred ten percent of such exemption.
- (b) The false claiming of the exemption authorized in the ordinance shall constitute a misdemeanor; any person convicted of falsely claiming such exemption shall be punished by a fine not exceeding three hundred dollars, or confinement in jail not exceeding thirty days, either of both.
- (c) Failure to pay the difference between the exemption and the full amount of taxes levied on the property for which the exemption is issued by due dates of the taxable year shall constitute a forfeiture of that exemption.

REAL ESTATE TAX RELIEF FOR ELDERLY & DISABLED

FINANCIAL STATEMENT FOR THE YEAR 2021

SOURCES OF HOUSEHOLD INCOME FOR YEAR 2021

	APPLICANT	SDOLISE	DELATIVE(S) I	IVING WITH YOU			
	AFFLICANT	SFUUSE	#1	#2			
WAGES AS SHOWN ON YEAR 2021 W-2 TAX STATEMENT(S)			π ι	πΔ			
TOTAL INTEREST EARNED ON ALL SAVING ACCOUNTS							
TOTAL INTEREST EARNED ON ALL CHECKING ACCOUNTS							
TOTAL INTEREST EARNED ON ALL CERTIFICATES OF DEPOSIT							
TOTAL DIVIDENDS EARNED ON ALL STOCKS & BONDS							
TOTAL NET INCOME EARNED ON RENTAL PROPERTIES							
TOTAL PENSION INCOME			2.50				
TOTAL ANNUITY INCOME							
TOTAL ALIMONY							
TOTAL CHILD SUPPORT							
SOCIAL SECURITY INCOME AS SHOWN ON YR 2021 SSA-1099 STMT							
SOCIAL SECURITY SUPPLEMENT							
TOTAL PUBLIC ASSISTANCE: SSI, ETC.							
PROFIT FROM SALE OF LAND, CATTLE, STOCKS, BONDS, ETC.							
OTHER INCOME (DESCRIBE:)						
TOTAL INCOME FOR EACH COLUMN							
	COLUMN A	COLUMN E	COLUMN C	COLUMN D			
YEAR 2021 COMBINED NET INCOME =====>							
	(,	ADD TOTAL	S FOR COLUM	NS A,B,C,D)			
SSN	_						
			YOUR (AND YOU				
109	9-INT, 1099-M	ISC, 1099-R	, AND W-2 FOR	TAX YEAR 20೩1			
PLEASE COMPLETE THE OTHER SIDE OF THE		_	_				

ASSETS						
	APPLICANT	SPOUSE				
YEAR 2021 DECEMBER 31 BALANCE IN CHECKING ACCOUNT(S)						
YEAR 2021 DECEMBER 31 BALANCE IN SAVINGS ACCOUNT(S)				. 1		
CERTIFICATES OF DEPOSIT (PRINCIPAL AMOUNT)						
MORTGAGE AND/OR TRUST NOTES DUE ME						
OTHER NOTES & RECEIVABLES DUE ME						
MARKET VALUE OF STOCKS AND BONDS						
FAIR MARKET VALUE OF OTHER REAL ESTATE OWNED				(A)		
FAIR MARKET VALUE OF AUTOMOBILES				COMBINED ASSETS		
TANGIBLE PERSONAL PROPERTY (WE USE 500.00 FOR TOTAL)	500					
TOTAL FOR EACH PERS	SON					
LIABILITIES NOTES PAYABLE	APPLICANT	SPOUSE				
ACCOUNTS PAYABLE						
TAXES OWED				(B)		
OTHER DEBTS OWED			1	COMBINED LIABILITIES		
REAL ESTATE MORTGAGES OWED			\			
TOTAL FOR EACH PERS	SON					
("A" MINUS "B") YOUR 2021 COMBINED NET FINANCIAL WORTH: THE INFORMATION YOU PROVIDE ABOVE IS USED SOLELY FOR DETERMINING THE AMOUNT OF YOUR REAL ESTATE TAX RELIEF. THE INFORMATION YOU PROVIDE ON THIS FINANCIAL STATEMENT WILL NOT BE RELEASED BY US TO ANYONE ELSE FOR ANY						
THE INFORMATION YOU PROVIDE ON THIS FINANCIAL STATEMENT PURPOSE!	WILL NOT BE RE	LEASED BY	US TO ANYO	NE ELSE FOR ANY		