

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, 2021.

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 does not include a reduction in “personal property” tax. It only pertains to real estate. The applicant and/or the applicant’s spouse must be the homeowner. The homeowner must have owned the home as of January 1, 2022. The amount of tax relief to which you may be eligible will be dependent on your income for the year 2021. The maximum amount of tax relief currently allowed by County Ordinance is \$500. **THE APPLICATION DEADLINE IS FEBRUARY 28, 2022.**

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. **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.

**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) Last Name First Middle

ADDRESS

BIRTHDATE **SOCIAL SECURITY NO:**
Month/Day/Year

PHONE NUMBER:

SPOUSE
Last Name First Middle

BIRTHDAY **SOCIAL SECURITY NO:**
Month/Day/Year

Name(s) under which property is listed and appears on the tax bill, be sure to note joint ownership if applicable.

NAME(S)

Street Address of Property

Tax Map and Parcel Number Copy from Tax Bill:

FOR OFFICE USE ONLY

	INCOME =	NET WORTH =
TAX YEAR	Percentage of relief granted	\$
	Current year Tax Due	\$
	Amount of Relief Granted	\$
	Balance to be Paid by Taxpayer	\$

REAL ESTATE TAX RELIEF FOR ELDERLY & DISABLED

FINANCIAL STATEMENT FOR THE YEAR 2021

SOURCES OF HOUSEHOLD INCOME FOR YEAR 2021

	APPLICANT	SPOUSE	RELATIVE(S) LIVING WITH YOU	
			#1	#2
WAGES AS SHOWN ON YEAR 2021 W-2 TAX STATEMENT(S)				
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				
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 B COLUMN C COLUMN D

YEAR 2021 COMBINED NET INCOME =====>

(ADD TOTALS FOR COLUMNS A,B,C,D)

SSN _____

NAME _____

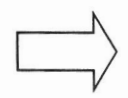
ADDRESS _____

PLEASE ATTACH COPIES OF YOUR (AND YOUR SPOUSE'S)
SSA-1099 SOCIAL SECURITY STATEMENT(S), 1099-DIV,
1099-INT, 1099-MISC, 1099-R, AND W-2 FOR TAX YEAR 2021

PLEASE COMPLETE THE OTHER SIDE OF THIS PAGE ALSO

ASSETS

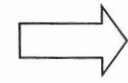
	APPLICANT	SPOUSE
YEAR 2021 DECEMBER 31 BALANCE IN CHECKING ACCOUNT(S)		
YEAR 2021 DECEMBER 31 BALANCE IN SAVINGS ACCOUNT(S)		
CERTIFICATES OF DEPOSIT (PRINCIPAL AMOUNT)		
MORTGAGE AND/OR TRUST NOTES DUE ME		
OTHER NOTES & RECEIVABLES DUE ME		
MARKET VALUE OF STOCKS AND BONDS		
FAIR MARKET VALUE OF OTHER REAL ESTATE OWNED		
FAIR MARKET VALUE OF AUTOMOBILES		
TANGIBLE PERSONAL PROPERTY (WE USE 500.00 FOR TOTAL)	500	
TOTAL FOR EACH PERSON		



(A)
COMBINED ASSETS

LIABILITIES

	APPLICANT	SPOUSE
NOTES PAYABLE		
ACCOUNTS PAYABLE		
TAXES OWED		
OTHER DEBTS OWED		
REAL ESTATE MORTGAGES OWED		
TOTAL FOR EACH PERSON		



(B)
COMBINED LIABILITIES

YOUR 2021 COMBINED NET FINANCIAL WORTH:

("A" MINUS "B")

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 PURPOSE!