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Real Estate Tax Relief and Assistance Program for Elderly and Disabled Persons

Residents of the City of Alexandria who are either 65 years of age or older or permanently and totally disabled, or become such during the current calendar year, may be eligible for the City's Real Estate Tax Relief Program for Elderly and Disabled Persons.

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Real Estate Tax Relief and Assistance

Program for Elderly and Disabled Persons

Residents of the City of Alexandria who are either 65 years of age or older or permanently and totally disabled, or become such during the current calendar year, may be eligible for the City's Real Estate Tax Relief Program for Elderly and Disabled Persons. Tax relief may be prorated for persons who turn 65 or who become disabled during the year. Applications for Real Estate tax relief are due by April 15 each year. Extensions may be granted for late applications for 1st time filers or for hardship circumstances. Please contact taxrelief@alexandriava.gov to discuss late applications.

NOTE: Please do not send any documents or messages that contain personal or confidential information to City email addresses. If you need to submit documents that contain personal or confidential information, please email taxrelief@alexandriava.gov or call 703.746.4800 to request a secure link for uploading confidential documents.

Program Requirements

Income Requirements:

- The **total combined household gross income** of the applicant and his/her spouse shall not have exceeded **\$100,000 for the calendar year**.
Total combined gross household income includes the income of the applicant and, if living in the home, the applicant's spouse, as well as that of any other owners, and any income in excess of \$10,000 per year for other relatives of the applicant or spouse living in the home.
- To qualify for a **full** tax exemption in the current year, a household's gross combined income may not have exceeded \$40,000 in the prior year.

- To qualify for a partial exemption equal to **50 percent** of the taxes owed for the current year, a household's gross combined income may not have exceeded \$55,000 in the prior year.
- To qualify for a partial exemption equal to **25 percent** of the taxes owed for the current year, a household's gross combined income may not have exceeded \$72,000 in the prior year.
- Taxes over the maximum exemption may be deferred for qualifying applicants, subject to repayment with interest upon conveyance or demise of the owner.
- Qualifying elderly and disabled applicants with gross income over \$72,000 but not in excess of \$100,000 may defer their taxes, also subject to repayment with interest. An exemption does not apply for this category.
- Only **deferred** taxes need to be repaid. **Exempted** taxes do not need to be repaid.

Asset Requirements

- The assets of the household may not exceed \$430,000 (excluding the house and one acre of land).

Disabled Persons

Permanently and totally disabled persons must attach to the application or affidavit form, certification of their disability from the Social Security Administration Office, the Department of Veterans Affairs or the Railroad Retirement Board, or a sworn affidavit by two medical doctors licensed to practice in the Commonwealth of Virginia. The certification or affidavit must state that the applicant is unable to engage in any substantial gainful activity by reason of any medically determinable physical or mental impairment or deformity which can be expected to last for the duration of the applicant's life.

Verification of Income and Assets

All applicants must attach copies of documents to support income, e.g., Social Security statements (**SSA-1099**), Railroad Retirement (**RRB-1099**), pension statements (**1009-R**), wages (**W-2**), interest income (**1099-INT**), dividend income (**1099-DIV**), divorce agreements, leases, and year-end financial statements, etc. Applicants required to file a Federal Income Tax Returns must provide a copy of the tax returns (with all attachments).

Filing and Application

[Elderly and/or Disabled Tax Relief Application](#) 

Completed applications or annual certifications must be filed with the Department of Finance by **April 17, 2023**.

Late Application: Normally, late applications can be accepted no later than April 15 of the following calendar year, provided the delay was due to good cause, such as hospitalization, medical illness, or being a first-time applicant. No late applications will be accepted for any reason beyond this hardship date (Section 3-2-165(c), Code of the City of Alexandria).

Any resident wishing to receive an application by mail should contact:

Tax Relief Program

301 King Street, Room 1700

Alexandria, VA 22314

703.746.4800

Email: taxrelief@alexandriava.gov

NOTE

The City Code requires that applicants who qualify for tax relief notify the Tax Relief Program in the event of any financial changes or the death of the applicant during the year that affects their eligibility status. Examples of changes that need to be reported include: (a) Change of residence; (b) Sale of the residential property in the City; (c) The death of the applicant(s); or (d) Changes in income or assets.

Changes in income, financial worth, ownership of the qualified property, or other factors occurring during the year for which tax relief is sought that affect the applicant's eligibility status may adjust or eliminate any tax relief for the remainder of the tax year. Tax relief granted up to the date of any change that has affected the taxpayer's eligibility for this program is not affected.

Further Information

Application assistance is available by phone or email at:

Tax Relief Program

703.746.4800

Email: taxrelief@alexandriava.gov

Application drop-off only is available from **8 a.m. to 5 p.m., Monday through Friday**, at:

Revenue Division

301 King Street, Room 1700

Alexandria, VA 22314

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Alex311 </alex311> | 703.746.4311

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Visitor Information

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