

**KING AND QUEEN COUNTY REAL ESTATE TAX EXEMPTION
TAX RELIEF FOR THE ELDERLY AND DISABLED**

TAX RELIEF FOR THE YEAR _____

**Income cannot exceed \$35,000.00
Financial worth cannot exceed \$60,000.00
Maximum annual exemption is \$500.00**

Name of Applicant: _____

Social Security # _____ **Date of Birth:** _____

Name of Spouse: _____

Spouse's Social Security # _____ **Date of Birth:** _____

Address: _____

Home Phone #: _____

Real Estate Listing: _____

Map #	District	Land Value	Bldg Value	Total Value

TOTAL COMBINED INCOME FROM THE PRECEDING YEAR:

Your income \$ _____ **Spouse's income \$** _____

Relative living in home?

Name _____ **Income \$** _____

**TOTAL COMBINED INCOME (from all sources) FOR THE OWNER, SPOUSE,
AND RELATIVES LIVING IN THE DWELLING: \$** _____

TOTAL FINANCIAL WORTH:

**Total of all Assets (this total excludes the dwelling
and dwelling site not to exceed
two acres) \$** _____

.....

DISABILITY STATUS

If you are disabled, list the agency certifying your disability status:

Agency Name: _____

ATTACH A COPY OF THE AGENCY'S CERTIFICATION

COMBINED INCOME STATEMENT – worksheet

My total combined income from the preceding year from all sources is as follows:

INCOME SOURCES

Wages, salaries, bonuses, commissions \$ _____

Tips & gratuities \$ _____

Dividends and other earnings from investments \$ _____

Interest from bonds, loans, savings accounts \$ _____

Civil Service, industrial and other pensions \$ _____

Retirement compensation, annuities and endowments \$ _____

Rents and 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 or trust income \$ _____

Alimony and separate maintenance and other support payments .. \$ _____

Railroad Retirement Act benefits \$ _____

Virginia Supplemental Retirement Act benefits \$ _____

State, county, city or town retirement systems benefits \$ _____

Gifts, inheritances, etc. \$ _____

Workman’s compensation, insurance damages for injury, etc. \$ _____

Life insurance proceeds \$ _____

Social Security \$ _____

Social Security supplements \$ _____

Veteran and veteran’s family benefits \$ _____

Farm income, crops, livestock, soil banks, etc. \$ _____

Unemployment, welfare benefits, etc. \$ _____

Other social services benefits such as fuel, food stamps, etc. \$ _____

Any other income, please specify \$ _____

TOTAL COMBINED INCOME \$ _____

FINANCIAL WORTH STATEMENT (worksheet)

My financial worth, including equitable interest as of the 31st day of December, _____, is as follows:

Cash on hand and in banks, savings accounts, certificates and trust funds, including part interest

_____ \$ _____
_____ \$ _____

Money due me: Mortgages, notes, including part interest

_____ \$ _____
_____ \$ _____

Value of stocks, bonds, government bonds, life insurance(cash value), etc.

_____ \$ _____
_____ \$ _____

Exempting your dwelling and dwelling site, not to exceed 2 acres of land, list all other real estate including part interest:

Description	Titled in Whose Name	Fair Market Value	Mortgage
_____	_____	_____ \$ _____	_____
_____	_____	_____ \$ _____	_____
_____	_____	_____ \$ _____	_____

Other assets (e.g. tangible property) like those listed on the Tangible Personal Property Form:

Description	Titled in Whose Name	Fair Market Value
_____	_____	_____ \$ _____
_____	_____	_____ \$ _____
_____	_____	_____ \$ _____

TOTAL ASSETS \$ _____

I, the undersigned, declare this to be a true and accurate statement of my financial condition on the 31st of December of the preceding year.

Signature of Owner: _____

Signature of Spouse or Co-Owner: _____

**I, the undersigned, declare this to be a true and accurate statement of
My total income during the immediately preceding calendar year from
ALL sources. Any applicant making false statements to obtain tax relief
under this Ordinance shall be deemed guilty of a Class 1 misdemeanor.**

Signature of Applicant: _____

(use a separate worksheet for spouse or each relative)

KING AND QUEEN COUNTY VIRGINIA

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

OATH

I, the undersigned applicant, 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 Applicant

Sworn (or affirmed) to before me

This _____ day of _____, _____.

Signature of Notary Public

My commission expires: _____

Reg. # _____

AUTHORIZATION FOR INVESTIGATION

I hereby give my consent and permission to any governmental agency, any corporation, financial institution, retirement system or other source of income to me, to release to the Commissioner of the Revenue of King and Queen County, Virginia, any information he/she may request for the purpose of ascertaining my eligibility for relief under the "Real Estate Tax Exemption Ordinance of King and Queen County, Virginia."

Signed: _____
Name

Address: _____

Date: _____

Witness if signed by mark: _____

Date: _____

Name, relationship, address of person/persons giving information other than land owner:

Name: _____

Relationship: _____

Address: _____

Telephone number: _____