



# REAL ESTATE AND MOBILE HOME TAX RELIEF APPLICATION

Office of the Commissioner of the Revenue  
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# 2019

Gerald H. Gwaltney  
Commissioner

Total Income \_\_\_\_\_ Percentage of relief up to \$1000.00 \_\_\_\_\_

**\*\*\* All renewal applications must be filed by June 30, 2019 \*\*\***

Tax ID No.: <b>For Office Use</b>	For Office Use Only
Applicant's Name: _____ <small>Last first middle</small>	Date Rec'd _____
Address: _____	<input type="checkbox"/> Real Estate
Date of Birth: _____ Soc. Sec. No.: _____ Phone: _____	<input type="checkbox"/> Elderly
Co-applicant's Name: _____ <small>Last First M. I.</small> Check one: <input type="checkbox"/> Spouse <input type="checkbox"/> Co-owner	<input type="checkbox"/> Disabled
Address: _____	<input type="checkbox"/> Mobile Home
	ID# _____
	Bill _____

Date of Birth: \_\_\_\_\_ Soc. Sec. No.: \_\_\_\_\_ Phone: \_\_\_\_\_

Name(s) as shown on real estate tax bill: \_\_\_\_\_

Is this property: over one acre?  Yes  No occupied by the applicant as the sole dwelling?  Yes  No

List the name, relationship, age, and social security number of ALL PERSONS who occupy the above residence.

Name	Relationship	Age	Social Security Number

### General Eligibility Requirements

- Applicant must have an ownership interest as of December 31, 2018, in the property for which tax relief is sought.
- Applicant must be 65 years old or older, or totally and permanently disabled, as of June 30, 2019.
- Gross combined income from all sources of the applicant and all persons living in the dwelling must not exceed \$46,100. **Note: documentation of all sources of income (including a copy of your 2018 federal income tax return, bank statements, broker statements, etc.) will be required, without exception.**
- Net worth of the applicant, spouse, and all co-owners as of December 31, 2018, must not exceed \$193,000 (excluding the dwelling and up to one acre of land on which the dwelling is situated). **Note: Relief will only be granted on up to one acre of land. Documentation of all assets and liabilities will be required, without exception.**
- Applications must be filed by June 30, 2019.
- For a detailed statement of eligibility requirements, please see insert.

FOR OFFICE USE ONLY			
	Land	Improvement	Total Value
Land Value and Residence			
One Acre Value and Residence			
Land Value Over One Acre			
Mobile Home			

Real Est./Mob. Home Eligible for Tax Relief		Annual Tax	1 <sup>st</sup> Half	2 <sup>nd</sup> Half
Percent	Tax			
	Relief Granted			
	Balance Due			

## GROSS INCOME

Report gross income for the CALENDAR YEAR 2018 from all sources of the applicant, spouse, and all persons living in the dwelling. **The applicant, spouse, all persons living in the dwelling must include a copy of their federal income tax return for 2018 if they were required to file. DOCUMENTATION OF ALL INCOME LISTED MUST BE SUBMITTED WITH THIS APPLICATION. If more than one relative lives in the dwelling, list their names AND sources of income [lines (a) through (l) below] on a separate sheet.**

SOURCE OF INCOME	Applicant	Spouse (or Co-owner)	Other Relative Name-	Totals
(a) Salaries, Commissions, etc.	\$	\$	\$	\$
(b) Pensions & Annuities				
(c) Social Security or Railroad Retirement				
(d) Interest & Dividends				
(e) Earned Income Credit or Additional Child Tax Credit from Federal Form 1040)				
(f) IRA Distributions				
(g) Capital Gains				
(h) Rental Income				
(i) Insurance Benefits Received				
(j) Welfare, SSI, Alimony, & Child Support				
(k) Gifts-				
(l) Other (including income from trusts & businesses)				
<b>(m) SUB-TOTAL</b>	\$	\$	\$	\$
(n) Deduct \$6,500 from RELATIVE'S total income (not applicant or spouse/co-owner)			\$ (6,500)	\$
<b>(o) TOTAL GROSS INCOME (If less than \$0, enter \$0)</b>	\$	\$	\$	\$

**NET WORTH – Note: If total asset value exceeds \$193,000, attach a list of liabilities, excluding mortgages on the applicant's sole dwelling.** Complete the following list of assets **as of December 31, 2018**. Exclude the value of the dwelling and up to one acre of land upon which the dwelling is situated. **DOCUMENTS AND EVIDENCE SUPPORTING NET WORTH MUST BE SUBMITTED WITH THIS APPLICATION.**

VALUE OF ASSETS	Applicant	Spouse (or co-owner)	Totals
(a) Real Estate (in Isle of Wight County other than residence)	\$	\$	\$
(b) Real Estate (outside of Isle of Wight County – attach list & copy of tax bill)*			
(c) Personal Property (motor vehicles, boats, trailers, etc.)			
(d) Checking Accounts & Money Market Accounts			
(e) Savings Accounts			
(f) Certificates of Deposit			
(g) Stocks, Mutual Funds, & Bonds			
(h) Life Insurance (Cash Value)			
(i) IRAs, Thrift Accounts, Annuities, 401(k) Plans			
(j) Other Assets (Mortgages, Burial Plots, Trusts, etc.)			
<b>(K) TOTAL [Add lines (a) through (j)]</b>	\$	\$	\$

I do hereby declare that the information included in this application is, to the best of my knowledge and belief, complete and true in all respects and that I am the owner of the property listed and occupy it as my sole residence.

\_\_\_\_\_  
Signature of Applicant

\_\_\_\_\_  
Date

\_\_\_\_\_  
Signature of Co-Applicant

\_\_\_\_\_  
Date