

APPLICATION FOR SENIOR CITIZEN EXEMPTION
Sworn Statement of Adjusted Gross Income of Household and Return

APPLICATION DEADLINE MARCH 1

(Section 196.075 (4)(d), Florida Statutes)

APPLICATION YEAR _____

PARCEL NUMBER _____

DISTRICT _____

Applicant Name _____
Applicant or Household Member _____
Address _____
Address _____
Address _____

Disclosure of your Social Security number is not mandatory in order to receive this exemption if it was provided to the Property Appraiser to receive the regular homestead exemption. **DISCLOSURE OF YOUR SOCIAL SECURITY NUMBER IS MANDATORY FOR THE REGULAR HOMESTEAD EXEMPTION.** It is required by section 196.011(1), Florida Statutes. If you have not already provided your social security number to the Property Appraiser it should be provided now. The social security number will be used to verify taxpayer identity information and homestead exemption information submitted to property appraisers.

APPLICANT

Additional Household Member 1

Additional Household Member 2

Name _____
Date of Birth _____
Social Security Number _____
Does Applicant File a Federal Income Tax Return?
YES <input type="checkbox"/> If NO, please submit
NO <input type="checkbox"/> → Income Worksheet (Part 2)

Name _____
Date of Birth _____
Social Security Number _____
Does Applicant File a Federal Income Tax Return?
YES <input type="checkbox"/> If NO, please submit
NO <input type="checkbox"/> → Income Worksheet (Part 2)

Name _____
Date of Birth _____
Social Security Number _____
Does Applicant File a Federal Income Tax Return?
YES <input type="checkbox"/> If NO, please submit
NO <input type="checkbox"/> → Income Worksheet (Part 2)

TOTAL ADJUSTED GROSS INCOME FOR ALL HOUSEHOLD MEMBERS \$ _____

If income information is not available by March 1, send application anyway. You have until **JUNE 1** to send income info

AFFIRMATION

I hereby authorize the County Property Appraiser's office to obtain information from utility companies and other sources necessary to determine my continuing eligibility for the exemption. I must contact the County Property Appraiser to obtain the maximum Household adjusted gross income amount. This amount is subject to change each year. I hereby make application for the exemption indicated and affirm that I do qualify for same under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property described above. I understand that section 196.131(2), Florida Statutes provides that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding 1 year, or a fine not exceeding \$5000 or both. Further, under penalties of perjury, I declare that I have read the foregoing application and Statement of Adjusted Gross Income and the facts in it are true and correct. **I hereby certify that I am at least 65 years of age as of January 1 of the current year and that the total prior year adjusted gross income for all persons living in the household on January 1 of the current year, does not exceed the adjusted gross income as defined in s.62 of the United States Internal Revenue Code.**

Applicant Signature _____

Date _____

Phone Number () _____

Deputy _____
(Property Appraiser Representative)

OFFICE USE ONLY	
Income Verified:	Proof of Age:
1040/A <input type="checkbox"/>	B/C <input type="checkbox"/> Other _____
Docs <input type="checkbox"/>	Med Card <input type="checkbox"/> Initials _____
	D/L <input type="checkbox"/>



MIKE TWITTY, MAI, CFA
Pinellas County Property Appraiser
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Defining Household Income

Additional homestead exemption for persons 65 and older applies only to the property taxes levied by the taxing authority granting the exemption (Section 196.075, Florida Statutes).

To qualify for an additional homestead exemption of up to \$50,000 for persons age 65 or older, the "Household Income" (Total "Adjusted Gross Income") of all persons living in the home cannot exceed the maximum household adjusted gross income.

Definitions:

Household - A person or group of persons living together in a room or group of rooms as a housing unit, but the term does not include persons boarding in or renting a portion of the dwelling.

Household income - The adjusted gross income of all members of a household, as defined in s.62 of the United States Internal Revenue Code. This is the "Adjusted Gross Income" amount reported on IRS Form 1040.

Examples of supporting documentation includes:

- Rental Receipts
- Pension Statements
- Annuity Statements
- Income Statements
- Interest Statements
- Wage and Earning Statements
- Any other documentation supporting the applicant's household income
- Form W series
- Form 1099 series forms
- Form 1042 series forms
- Form 1065 series forms
- Form 4506
- Social Security Benefits worksheet, etc.

Income documentation of all persons living in the household should be submitted before June 1.

No documentation will be accepted after June 1.

According to the IRS:

- A person cannot file Form 1040EZ if he/she has taxable social security benefits. The person must file either Form 1040 or Form 1040A.
- If you have social security benefits, your social security benefits are not automatically included in adjusted gross income. If your gross income is below the filing thresholds for federal income tax, consult IRS to verify that no portion of Social Security income is included in adjusted gross income to meet the current Florida limit on adjusted gross income as factored for cost of living.
- If your combined benefits and other income exceed other applicable thresholds, some portions of your Social Security income may be taxable. Social Security benefits include monthly survivor and disability benefits. They do not include supplemental security (SSI) payments which are not taxable. Consult IRS for portions of Social Security income that may be taxable based on current formulas.

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315 Court Street - 2nd Floor
Clearwater, FL 33756

NORTH COUNTY
29269 US Highway 19 N
Clearwater, FL 33761

MID COUNTY
13025 Starkey Road
Largo, FL 33773

SOUTH COUNTY
1800 66th Street N
St. Petersburg, FL 33710

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