

\_\_\_\_\_  
Owner Name

\_\_\_\_\_  
Address 1

\_\_\_\_\_  
Address 2

\_\_\_\_\_  
City, State

\_\_\_\_\_  
Zip

\_\_\_\_\_  
Site Address

## REVIEW APPLICATION FOR LOW INCOME SENIOR EXEMPTION

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Please mark the appropriate box below. Fill in the requested information next to the box you checked.

**I file an Income Tax Return.** Please attach a copy of your IRS Form 1040.

My total annual household adjusted gross income for 2018 is \_\_\_\_\_.

**I do not file an income tax return.** Please provide copies of ALL of your income documentation for verification.

Examples of documentation include all Forms 1099, Social Security Statements, retirement, annuities, interest statements, etc. Please fill in below the amount of each type of income that your household received for 2018 and total on the last line.

**Social Security:** \_\_\_\_\_

**Interest:** \_\_\_\_\_

**Retirement:** \_\_\_\_\_

**Other Income:** \_\_\_\_\_

**2018 Total Household Income:** \_\_\_\_\_

### **\*\*IMPORTANT\*\***

**This application is due March 1<sup>st</sup>, but you have until June 1<sup>st</sup> to submit your income documentation. You MUST provide copies of the documentation for income you received as listed above or your exemption will not be renewed.**

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### **EXEMPTION REMOVAL**

**I no longer qualify for the senior exemption.** I understand that I will need to reapply in the future if my income meets the statutory limit.

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I do hereby affirm that I do qualify for this exemption under the Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property described above. I understand that under section 196.131 (2), Florida Statutes provides that any person who knowingly gives false information for the purpose of claiming an exemption is guilty of a misdemeanor of the first degree, punishable by imprisonment not to exceed one (1) year or a fine not exceeding \$5000.

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Date



**MIKE TWITTY, MAI, CFA**  
**Pinellas County Property Appraiser**  
www.pcpao.org      mike@pcpao.org

## 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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Clearwater, FL 33761

**MID COUNTY**  
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