

**APPLICATION FOR TAX RELIEF
FOR THE ELDERLY AND DISABLED**

*Pittsylvania County
Commissioner of the Revenue
P. O. Box 272
Chatham, VA 24531*

TAX YEAR 2009

DEADLINE: FEBRUARY 15TH

Telephone #: _____

Applicant's Name: _____

Spouse's Name: _____

Mailing Address: _____

Send C/O: _____

Applicant Birth date: _____ Soc. Sec. #: _____

Spouse Birth date: _____ Soc. Sec. #: _____

OTHER REQUIRED INFORMATION - APPLY NO LATER THAN

<p>Please indicate where your home is located:</p> <p>County _____</p> <p>Town of Gretna _____</p> <p>Town of Chatham _____</p> <p>Town of Hurt _____</p>	<p>FEBRUARY 15TH</p> <p>Please check if applicable:</p> <p>_____ I live in a mobile home and own the land it is on.</p> <p>_____ I own a mobile home ONLY.</p>	<p>Is your land assessed under the Land Use Program?</p> <p>_____ YES</p> <p>_____ NO</p>
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Did you live in this home all of all year? YES NO Please Explain.

List the names of all persons, other than your spouse, who are living with you at your home. Write "NONE" if there are no others living with you.

Name	Relationship	Social Security #
_____	_____	_____
_____	_____	_____

OATH I declare under the penalties provided by law that the information in this affidavit and any accompanying schedules and statements has been examined by me and to the best of my knowledge and belief is true, correct and complete.

Applicant's Signature

Spouse's Signature

Date

<p>ELDERLY _____</p> <p>DISABLED _____</p> <p>Date Received _____</p>	<p>OFFICE USE ONLY</p> <p>Legal Description _____</p> <p>Acreage _____</p>
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2009 TAX RELIEF FOR THE ELDERLY & DISABLED

Pittsylvania County offers tax relief to **homeowners** who qualify and file an annual application with the Commissioner of the Revenue. The tax relief reduces the “real estate tax” on a home plus up to one acre of land. Any land, which the homeowner owns, that exceeds one acre is not subject to tax relief. If a taxpayer owns more than one home, the tax relief will be applied to the primary residence only – Pittsylvania County’s tax relief program does not include a reduction in “personal property” tax. It only pertains to real estate tax. The applicant and/or the applicant’s spouse must be the homeowner. The homeowner must have owned the home as of January 1 of the tax relief year. The amount of tax relief to which you may be eligible will be dependent on your income for the past tax year. The maximum amount of the tax relief currently allowed by Pittsylvania County ordinance is \$300.00. **THE APPLICATION DEADLINE IS FEBRUARY 15th OF EACH YEAR.**

HOW TO QUALIFY

In general, a homeowner must meet an **AGE QUALIFICATION**, and **INCOME TEST**, and a **NET WORTH TEST**. In order to qualify, a homeowner must:

- ❖ be at least 65 years old by January 1st of the tax relief year, AND
- ❖ have an annual “household” income of \$18,000 or less, AND
- ❖ have a net worth that does not exceed \$60,000. (**HOME EXCLUDED**)

The **INCOME** test includes “**all income**” from all people who live in the home. *In calculating the combined income of the applicant the Commissioner of the Revenue shall deduct cost of prescription drugs and professional medical care, including hospital, doctors, and health insurance, evidenced by cancelled check or paid receipts from the 2008 tax year.* The applicant may exclude the first \$4,000 of income of each relative other than your spouse who also lives in the home. When considering the income test, you should include earned wages, pension payments, social security, interest, dividends, etc.

The **NET WORTH** test includes the value of your assets such as stocks, bonds, savings & checking accounts, rental properties, land value in excess of one acre, vehicles, farm equipment, etc. It **DOES NOT** include the value of your home and up to one acre of land that it sits on.

In order to qualify **you must meet each of these three tests** described above. One **EXCEPTION** is that **if you are not at least 65 years old, but you are permanently or totally disabled, you may still qualify as long as you can provide our office with a letter from the Social Security Office, other government office, or two doctors, indicating that you are permanently and totally disabled and unable to engage in any substantial gainful employment because of your disability. You must still meet the income and net worth tests.**

HOW TO APPLY

If you think that you qualify for Pittsylvania County’s tax relief program, please complete the enclosed application and financial statement. In addition to the application and financial statements **please include copies of any 2008 W-2 wage statements, 1099-DIV, 1099-Int, 1099-Misc, 1099-R, and SSA-1099 social security statements for the past tax year and return NO LATER THAN FEBRUARY 15th.**

If you qualify, your next real estate tax bill will be reduced by the amount of tax relief to which you are eligible. **If you have additional questions, please call our office at (434) 432-7940.**

REAL ESTATE RELIEF FOR ELDERLY & DISABLED FINANCIAL STATEMENT

DUE FEBRUARY 15th

****Please Attach Copies of all your (and your spouse's) W-2 and 1099 statements for the tax year 2008**

****DO NOT SEND ORIGINALS, they will not be returned. Failure to Attach all copies may disqualify you from tax relief**

APPLICANT'S SOCIAL SECURITY #: _____

SOURCES OF HOUSEHOLD INCOME	APPLICANT	SPOUSE	RELATIVE(S) LIVING IN YOUR HOME	TOTAL
Wages as shown on W-2 Tax Statement(s)				
Total Interest Earned on All Accounts (Ex. Checking, Savings, Certificate of Deposits, etc.)				
Total Dividends Earned on All Stocks & Bonds				
Total Net Income Earned on Rental Properties				
Total Pension and/or Annuity Income				
Total Alimony and/or Child Support				
Social Security Income as shown on SSA-1099 Statement (<i>**copy of statement must be attached</i>)				
Social Security Supplement				
Total Public Assistance (Ex. Food Stamps, Fuel Assistance, etc.)				
Profit from Sale of Land, Cattle, etc.				
Other Income Describe:				
TOTAL INCOME				
LESS: Total Amount Paid for prescriptions and medical care (including hospital, doctors, and health insurance) during 2008 (<i>**paid receipts or cancelled checks must be attached</i>)				
DUE IN OFFICE NO LATER THAN FEBRUARY 15TH	COMBINED NET INCOME			

ASSETS	APPLICANT	SPOUSE
DECEMBER 31 BALANCE IN CHECKING ACCOUNTS		
DECEMBER 31 BALANCE IN SAVINGS ACCOUNTS		
CERTIFICATE OF DEPOSIT (PRINCIPAL AMT)		
MARKET VALUE OF STOCKS & BONDS		
FAIR MARKET VALUE OF REAL ESTATE OTHER THAN YOUR HOME AND ONE ACRE OF LAND		
FAIR MARKET VALUE OF AUTOMOBILES		
TANGIBLE PERSONAL PROPERTY (FOR EXAMPLE: FURNITURE, APPLIANCES, ETC.)		
TOTAL FOR EACH PERSON		
	~A~ COMBINED ASSETS	

LIABILITIES	APPLICANT	SPOUSE
NOTES PAYABLE (FOR EXAMPLE: AMOUNT OWED ON CAR)		
ACCOUNTS PAYABLE (FOR EXAMPLE: SEARS, VISA, ETC)		
TAXES OWED (NOT PAID YET)		
OTHER DEBTS OWED (FOR EXAMPLE: MEDICAL, ETC)		
REAL ESTATE MORTGAGES OWED (TOTAL BALANCE)		
TOTAL FOR EACH PERSON		
	~B~ COMBINED LIABILITIES	

*The information that you provide above is used solely for determining the amount of your Real Estate Tax Relief.

**The information that you provide on this financial statement will not be released by this office to anyone else for any purpose!!

COMBINED NET FINANCIAL WORTH: (A - B)	
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TO APPLY APPLICATION MUST BE IN OFFICE NO LATER THAN FEBRUARY 15TH