

CITY OF COLONIAL HEIGHTS
COMMISSIONER OF THE REVENUE
201 JAMES AVENUE, P. O. BOX 3401
COLONIAL HEIGHTS, VIRGINIA 23834-9001
(804) 520-9280
FAX (804) 520-9250

APPLICATION FOR REAL ESTATE TAX RELIEF AS PROVIDED BY CITY CODE No. 258-16
FOR PERSONS 65 YEARS OF AGE OR OLDER ON JANUARY 1, 2020
OR PERMANENTLY AND TOTALLY DISABLED ON JANUARY 1, 2020

Please fill out this application in its entirety and return it to the Commissioner of the Revenue at the address listed above. Applications must be filed by **MARCH 31. COMPLETE ALL SPACES THAT ARE APPLICABLE.** This exemption is granted on an annual basis and a new application must be filed each year. **Supporting documents must accompany this application.** All information on the application is confidential and not open to public inspection.

FOR ADDITIONAL INFORMATION PLEASE CALL 520-9280.

Applicant _____
Last Name First Middle

Address _____

Birth Date _____ **Social Security No.** _____ **Telephone** _____

Spouse/Co-Owner _____
Last Name First Middle

Birth Date _____ **Social Security No.** _____ **Telephone** _____

Owner's Name as it appears on tax record _____
Last Name First Middle

Subdivision _____ **Block** _____ **Lot** _____

FOR OFFICE USE ONLY	
INCOME	NET WORTH

1. Are you the sole occupant of this dwelling? _____
2. If "NO" list the name, relation, ages and social security numbers of all persons **related** to the applicant who occupy the above dwelling.

Name	Relation	Age	Social Security Number

Please complete this gross income statement for the calendar year 2019. Included in this statement should be the total gross income from all sources of the applicant and spouse, and all income of each relative living in the dwelling. Provide copies of bank statements, 1099's, and w-2's.

Source of Annual Income	Applicant	Spouse	Relative living in dwelling
Salaries, Wages, etc.			
Pensions			
Social Security			
Supplemental Security Income (SSI)			
Interest			
Dividends			
Capital Gains			
Welfare			
Gifts			
Trust Fund Income			
Rental Income			
Other Sources			
TOTAL			

Total Gross Combined Income of the Applicant, Spouse, and Relatives \$ _____

Please complete this statement of net financial worth as of December 31, 2019.

Real Estate (**other than that in which you reside**. State accurately the location, and describe **FULLY**, all real estate owned by the applicant and spouse.

LOCATION AND DESCRIPTION OF OTHER REAL ESTATE	MARKET VALUE	ASSESSED VALUE
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TOTALS _____

List other assets. Provide bank, investment, and other financial institution statements

	Value of Assets	Applicant	Spouse
Cash on Hand			
Checking Account(s)			
Savings Account(s)			
Savings Certificate(s)			
Stocks			
Bonds			
Personal Property (Vehicles)			
Trust Funds			
Other Assets			
TOTAL ASSETS			

TOTAL COMBINED FINANCIAL WORTH OF THE APPLICANT AND SPOUSE \$ _____

CERTIFICATE

I certify, under the penalties provided by law, that this application for Real Estate Tax Relief for the Elderly and Disabled, including any accompanying schedules or statements, has been executed by me and to the best of my knowledge and belief is a true and complete statement.

Signature of Applicant

Date

REAL ESTATE TAX RELIEF FOR THE ELDERLY AND DISABLED

REQUIREMENT FOR EXEMPTION per City Code 258-16

1. Property for which exemption is claimed must be owned, or partially owned, on January 1 of the taxable year, by the person claiming exemption.
2. Owner of the property must be sixty-five years of age or older or permanently and totally disabled on December 31 of the year immediately preceding the taxable year. Such property must be occupied as the sole dwelling of the owner. "Owner", is used herein shall also be construed as "owners".
3. The total combined income of the owners living therein, spouses and relatives during the year immediately preceding the taxable year shall be determined by the Commissioner of the Revenue to be an amount not to exceed \$40,000.00. Gross combined income shall include all income from all sources of the owner and spouse and income in excess of \$4,000.00 of each relative living in the dwelling for which exemption is claimed.
4. The total combined net financial worth of all owners as of December 31 of the year immediately preceding the taxable year shall be determined by the Commissioner of the Revenue to be an amount not to exceed \$80,000.00. The combined net financial worth, including equitable interests, of the owners, and of the spouse of any owner, excludes the value of the dwelling and land, not exceeding one acre.
5. Applications for the real estate tax exemption must be filed with the Commissioner of the Revenue of Colonial Heights between January 1 and March 31 of the taxable year.
6. Any owner who has been granted a tax exemption must report any changes in his financial status to the Commissioner of the Revenue at once. Changes in respect to income, financial worth, ownership of property or other factors occurring during the taxable years for which the affidavit is filed and having the effect of exceeding or violating the limitations and conditions provided herein shall nullify any exemption for the then current taxable year and the taxable year immediately following; provided however, that a change in ownership to a spouse less than sixty-five years of age which resulted solely from the death of his or her spouse shall result in a prorated exemption for the then current taxable year.
7. Disabled persons must bring a copy of certificate of award from social security or a notarized statement from two different doctors licensed to practice medicine in the state of Virginia, stating that they are totally and permanently disabled.
8. A tax exemption shall be granted subject to the following scale:

\$22,800 or less income	100% exemption
\$22,801 - \$24,600	90% exemption
\$24,601 - \$26,400	80% exemption
\$26,401 - \$28,200	70% exemption
\$28,201 - \$30,000	60% exemption
\$30,001 - \$31,800	50% exemption
\$31,801 - \$33,600	40% exemption
\$33,601 - \$35,400	30% exemption
\$35,401 - \$37,200	20% exemption
\$37,201 - \$40,000	10% exemption

The maximum tax exemption on any such real estate in any tax year shall be one thousand dollars, six hundred dollars (\$1,600).

9. If you are required to file an Income Tax Return for 2019 it will be compulsory for you to file a copy with this office by May 1, 2020.