



2020 Elderly & Disabled Tax Relief Renewal

T. Scott Harris, MCR, Commissioner of the Revenue, Hanover County
PO BOX 129, Hanover, VA 23069

Phone: 804-365-6129 Fax: 804-365-6101 Email: commissioner@hanovercounty.gov

RENEWALS MUST BE FILED BY MARCH 16, 2020.

APPLICANT NAME AND ADDRESS

Account:

Case:

PLEASE CHECK THE APPROPRIATE BOXES BELOW:

Tax Relief for the Elderly
(65 years or older)

OR

Tax Relief for the Permanently Disabled

Relief of real estate taxes

OR

Relief of mobile home taxes

GENERAL INFORMATION AND REQUIREMENTS

- ❖ The applicant must be **65 years old** or older by **December 31, 2019 OR totally and permanently disabled** and **reside on the property**.
- ❖ The applicant must be an owner of the property on December 31 of the preceding year. If the applicant is in a hospital or other extended care facility on December 31, they may still qualify if the house is not rented or leased for consideration.
- ❖ Gross combined income of all owners and relatives living in the home cannot exceed **\$52,500**. The income of all relatives living in the house must be included; however, up to \$10,000 from each non-owner may be excluded. For applicants applying under the disabled criteria, up to \$10,000 from the applicant may be excluded as well.
- ❖ Combined financial worth of the applicant and spouses may not exceed **\$200,000**. The value of the house and up to ten (10) acres of land on the same parcel is excluded from your net worth.
- ❖ The amount of the tax relief will be based on an approved sliding scale using the combined household income and multiplied by the % ownership of the qualifying owners.
- ❖ Full Applications are required every three years. Between those three years, a signed affidavit will be required to continue your tax relief status. If there has been a significant change in your income or assets you must immediately notify the Commissioner of the Revenue so you may complete another full application.
- ❖ If you require assistance in completing this form, we can assist you in person (without an appointment) at the Hanover County Government Complex, Chenault Weems Building, 7507 Library Drive, Hanover, VA or by telephone at 804-365-6128.

COMPLETE ALL SECTIONS ON FORM AND ANSWER ALL QUESTIONS. IF A QUESTION DOES NOT APPLY TO YOU, ENTER N/A OR 0. FORMS MUST BE RETURNED TO THE COMMISSIONER OF THE REVENUE BY MARCH 16.

Street Address of Property: _____

Mailing Address – if different: _____

Applicant: _____
Last Name First Middle

Birth Date: _____ **Phone:** _____
Month Day Year

Spouse: _____
Last Name First Middle

Birth Date: _____ **Phone:** _____
Month Day Year

Complete the following questions.

1. Is the property occupied by the applicant as his/her sole dwelling? Yes ____ No ____

2. What is Applicant's Ownership? (Check the appropriate space.)

100% Owner (with or without Spouse) ____ **Partial Owner** ____

If a Partial Owner, please list all other owners and each owner's percentage of ownership.

List name(s) of all owners, their percentage of ownership and if the house is the sole dwelling.

Applicant		Percentage of Ownership		
Name	DOB	Percentage of Ownership		____ Yes/No Sole Dwelling
Name	DOB	Percentage of Ownership		____ Yes/No Sole Dwelling
Name	DOB	Percentage of Ownership		____ Yes/No Sole Dwelling

3. Are any other adults over the age of 18, other than the spouse, living in the residence? ____ Yes/No

If yes, please complete the following for adults over the age of 18 living in the residence:

Name	Relationship	Age

4. Are any of the adults listed above acting as a caregiver of the applicant and/or spouse? ____ Yes/No

TOTAL INCOME FOR CALENDAR YEAR 2019

Include the total income from all sources of the applicant, spouse, and all persons living in the residence. If you answered yes to question 4 above, do not include the income of the caregiver. If there is no income for a specific line, enter "0".

Total Income (Before deductions)	APPLICANT	SPOUSE	OTHERS	TOTAL
Salaries & Wages (W-2)				
Pensions & Annuities				
Social Security or Railroad Retirement				
Disability Income				
Interest & Dividends				
Public Assistance, Prizes Won, Gifts				
Capital Gains				
IRA Distributions				
Rental Income				
Other including self-employment				

NEXT TWO LINES FOR OFFICE USE ONLY

Deductions				
Total Income				

NET FINANCIAL WORTH AS OF DECEMBER 31, 2019

Do not include the value of the house on which you are seeking relief or the mortgage against it.

NET VALUE OF ASSETS	APPLICANT	SPOUSE	TOTAL
Personal Property (vehicles)			
Other real estate located in Hanover			
Other real estate located outside of Hanover			
Savings Accounts			
Checking & Money Market Accounts			
Stocks, Bonds, Mutual Funds, etc.			
Life Insurance (cash value only)			
Worker's Compensation Benefits			
IRAs, annuities, 401K balances			
Certificates of Deposits (CDs)			
Other assets such as trust accounts			
Total Assets			
Unpaid balance of bank loans for vehicles, etc			
Credit card & merchant balances			
Mortgage balance on other properties owned			
Federal, state or local taxes past due			
Other debt – medical bills, etc.			
Total Liabilities			
Total Net Value of Assets			

