

TRAVIS CENTRAL APPRAISAL DISTRICT

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APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION FOR

Year: _____

| | | | |
|--|---|------------------------------------|---|
| For appraisal district office use only | | Parcel number: _____ | |
| LEGAL DESCRIPTION: | | | |
| <p>You may only apply for a residence homestead exemption on one property in a tax year. Fill out the application completely. File it between January 1 and no later than April 30. You may file a late homestead exemption application if you file it no later than one year after the date taxes become delinquent. See the over-65 or disability actions for more on late filing. If you were eligible for an exemption last year, check the box in Step 5 below. Be sure to attach any additional documents requested.</p> | | | |
| STEP 1: | Owner's Name: _____ | | Telephone: _____ Work _____ Home _____ |
| | Current Mailing Address (Number and Street) : _____ | | City, State, Zip Code: _____ |
| | Driver's License, Personal ID, Certificate, or Social Security Number*: _____ | | Your Birth Date: (If over 65) _____ Spouse's Date of Birth: _____ |
| | Percent Ownership in Property: _____ | Other Owner's Name (If any): _____ | Other Owner's Percent Ownership: _____ |
| STEP 2: | Street address if different from above, or legal description if no street address: _____ | | |
| | <p>MOBILE HOMES - Give make, model and identification number: Attach a copy of statement of ownership and location issued by the Texas Department of Housing and Community Affairs if home is 8' X 40' or larger or attach a verified copy of the purchase contract that shows you are owner of the mobile home.</p> | | |
| | <p>OPTIONAL- Number of acres used for residential purposes (yard, garden, garage, etc.) _____ Acres</p> | | |
| STEP 3: | <p>GENERAL RESIDENTIAL EXEMPTION: To qualify for homestead exemptions, you must own and reside in your home on January 1 of the tax year. If you temporarily move away from your home, you still can qualify for an exemption if you don't establish another principal residence and you intend to return in a period of less than (2) years. Homeowners in military service or in a facility providing services related to health, Infirmary or aging may exceed the two year period.</p> | | |
| | <p>DELETE EXEMPTION ON: _____ for _____ (street address, city, county) (year)</p> | | |
| | <p>OVER-65 EXEMPTION: You qualify for this exemption if you are 65 years of age or older. This exemption also includes a school tax limitation, or ceiling. You can't claim a disability exemption if you claim this exemption. You must apply within one year of the date you acquired the home, if you were 65 or older when you acquired and owned the home and turned 65 after January 1. Proof of age is required. Attach copy of Driver's License or Birth Certificate. Check if you will transfer a tax ceiling from your last home Yes No</p> | | |
| | <p>DISABILITY EXEMPTION: You qualify for this exemption if you are under a disability for the purposes of payment of disability benefits under the federal old age, Survivor's and Disability Insurance Act or you met the definition of disabled in that act. You can't claim an over-65 exemption if you claim this exemption. You must apply before the first anniversary of your qualification date to receive the exemptions in that tax year. This exemption also includes a school tax limitation. Attach current disabilities documents. Check if you will transfer a tax ceiling from your last home Yes No The Disabled Veterans Exemption requires a different form.</p> | | |
| | <p>OVER-55 SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE OVER-65 EXEMPTION: You qualify for an extension of this exemption if (1) you are 55 years of age or older on the date your spouse died and (2) your deceased spouse was receiving the over-65 or disability exemptions on this residence homestead or would have applied and qualified for the exemption in the year of the spouse's death. You will not receive the school tax limitation for the over-65 exemption unless your spouse died on or after Dec. 1, 1997. You will not receive the school tax limitation for the disability exemption unless your spouse died on or after January 1, 2003. Check if you will transfer a tax ceiling from your last home Yes No</p> | | |
| | Deceased Spouse's Name: _____ | | Date of Death: _____ |
| STEP 4: | <p>ANSWER IF APPLIES</p> <p>COOPERATIVE HOUSING RESIDENTS- Do you have an exclusive right to occupy this unit because you own stock in a cooperative housing corporation? Yes No</p> | | |
| STEP 5: | <p>CHECK IF LATE</p> <p>Application for homestead exemption for prior tax year _____.</p> | | |
| STEP 6: | <p>By signing this application, you state that you are qualified for the exemptions checked above. You state that the facts in this application are true and correct. You also state that you do not claim an exemption on another residence homestead. You must notify the chief appraiser if and when your right to the exemptions end. You swear or affirm that you have read and understand the penalty for filing a false statement.</p> | | |
| | <p>SIGN AND DATE THE APPLICATION</p> <p>Authorized signature _____ sign here </p> | Date _____ | |
| <p>If you make a false statement on this application, you could be found guilty of a Class A Misdemeanor or a state jail felony under Texas Penal Code Section 37.10.</p> | | | |

* You are required to give us this information on this form, in order to perform tax related functions for this office. Section 11.43 of the Tax Code authorizes this office to request this information to determine tax compliance. The chief appraiser is required to keep the information confidential and not open to public inspection, except to appraisal office employees who appraise property and authorized by Section 11.48 (b), Tax Code. © Easy Access, Inc

APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION INSTRUCTIONS

General Residential Homestead Exemptions. You may only apply for residence homestead exemptions on one property in a tax year. Fill out the other side of this application completely. To qualify for homestead exemptions, you must own and reside in your home on January 1 of the tax year. If you temporarily move away from your home, you still can qualify for an exemption if you don't establish another principal residence and you intend to return in a period of less than two (2) years. Homeowners in military service or in a facility providing services related to health, infirmity or aging may exceed the two-year period. If you have trouble filling out this form, call the appraisal district.

Over-65 or Disability Exemptions. You may receive over-65 or disability homestead exemptions immediately upon qualification for the exemption(s). You must apply before the first anniversary of your qualification date to receive the exemption(s) in that tax year. For example, if you turn 65 or are disabled on June 1 of the current year, you have until May 31 of the next year to apply for the current tax year's over-65 or disability exemption(s). This special provision only applies to over-65 or disability exemptions and not to other exemptions for which you may apply.

Tax Limitations. The over-65 or disability exemption for school taxes includes a school tax limitation, or ceiling. Other types of taxing units – county, city, or junior college – have the option to grant a tax limitation on homesteads of homeowners disabled or 65 years of age or older. You may transfer the same percentage of school taxes paid to another qualified homestead in the state. If the county, city or junior college grants the limitation, you may transfer the same percentage of taxes paid to another qualified homestead within that same taxing unit.

Surviving Spouse Age 55 or Older. Over 65: You qualify for an extension of this exemption if (1) you are 55 years of age or older on the date your spouse died and (2) your deceased spouse was receiving the over-65 exemptions on this residence homestead or would have applied and qualified for the exemption in the year of the spouse's death. You will not receive the school tax limitation for the over-65 exemption unless your spouse died on or after December 1, 1987. Disabled: While you would not qualify for a disability exemption claimed by your deceased spouse, you will be entitled to continue the school tax limitation if your spouse died on or after January 1, 2003.

Filing Deadlines. File this application between January 1 and no later than April 30. You may file a late homestead exemption application if you file it no later than one year after the date taxes become delinquent. See the over-65 or disability exemptions section above for more on late filing.

Re-filing. If the chief appraiser grants the exemptions, you do not need to reapply annually. You must reapply, however, if the chief appraiser requires you to do so by sending you a new application asking you to reapply. You must notify the chief appraiser in writing if and when your right to any exemption ends or your qualifications change. You must reapply if you qualify for additional exemptions based on age or disability in the future.

Step 1. Owner's name and address. Enter the following information:

- Name of the owner completing this application.
- This owner's current mailing address and phone number.
- Driver's license number, personal identification number, or Social Security number of this owner (kept confidential).
- Percentage of ownership by this owner.
- This owner's birth date.
- Names of other owners and their percentage of ownership. Attach additional sheets if needed.

Step 2. Describe the property. Enter the information requested. Attach the mobile home statement of ownership and location, or sales contract. Enter, if you wish, the number of acres used for residential purposes.

Step 3. Check exemptions that apply to you. Complete by checking the boxes that apply. If you check the disability exemption, attach documents verifying your disability. If a surviving spouse age 55 or older, enter the information requested. The appraisal district may request documents on date of spouse's death.

Step 4. Answer if applies. If the property is cooperative housing, complete Step 4.

Step 5. Check if late. If you were eligible for an exemption last year, check the box in Step 5 for late filing and enter the prior tax year.

Step 6. Sign and date the application. You must sign and date this application. Making false statements on your exemption application is a criminal offense.

If you would like to know the homestead exemptions offered by your taxing units, call the Travis Central Appraisal District at (512) 834-9138 or go online at www.traviscad.org.