

Original Application for Ad Valorem Tax Exemption for Charlotte County

Application Id: _____ Type: _____ Tax Year: _____

Property Identification Number: _____

Exemption Type

Owner: _____

Mailing Address: _____

City: _____ State: _____ Zip: _____

Property Address: _____

Legal Description: _____

- Homestead Exemption up to \$50,000
 - \$500 Widow
 - \$500 Widower
 - \$500 Disability
 - \$5,000 Disabled veteran
 - \$500 Blind Person
 - Total and permanent disability - Quadriplegic *
 - Service connected total and permanent disability *
 - Disabled veteran confined to a wheelchair *
 - Total and permanent disability *
- *Documentation required

Note: Disclosure of your Social Security number is mandatory. It is required by section 196.011 (1), Florida Statutes. The social security number will be used to verify taxpayer identity information, homestead exemption information submitted to property appraisers, and intangible tax information submitted to the Department of Revenue

Did you file tax exemption last year? Yes No

Address last year: _____

Ownership Information

Percent of ownership: _____ Type of deed: _____

Recorded: Book: _____ Page: _____

Date recorded: _____ Date of deed: _____

Permanent Florida residency required as of January 1

| Proof of residence for all applicants | Owner | Co-owner | Other Owner |
|--|-------|----------|-------------|
| Name | | | |
| Address if not residing on the property | | | |
| Date last became a permanent resident of Florida | | | |
| Date of occupancy | | | |
| Florida drivers license number | | | |
| Date license issued | | | |
| Florida vehicle tag number | | | |
| Florida voter reg no (US citizen) | | | |
| Date registered as voter | | | |
| Date of birth | | | |
| Social Security Number | | | |
| Marital Status | | | |
| Husband, Wife, Other | | | |
| Spouses death date if applicable | | | |
| Immigration No (non-US citizen) | | | |
| Date alien card granted | | | |
| Declaration of Domicile Res date | | | |
| Current employer | | | |
| Address listed on last IRS return | | | |

NOTE: I hereby authorize this agency to obtain information necessary to determine my eligibility for the exemption(s) applied for. If all information is not received by March 1st, your application will be processed for whatever exemption you qualify for on that date.

I hereby make application for the exemption(s) indicated and affirm that I do qualify under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property above. I understand that section 196.131 (2), Florida Statutes provide that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding 1 year or a fine not exceeding \$5,000 or both. Further, under penalties of perjury, I declare that I have read the foregoing application and the facts in it are true.

IN ADDITION, I HEREBY CERTIFY THAT I DO NOT HOLD NOR AM I SEEKING A PROPERTY TAX RELATED EXEMPTION IN ANOTHER STATE.

Owner Signature _____

Co-Owner Signature _____

Other Owner Signature _____

Date: _____

Home Phone: _____

Deputy: _____

Location: _____

Work Phone: _____

This application must be filed with the property appraiser on or before March 1

The information contained in this application will be provided to the Department of Revenue and may also be provided to any state in which the applicant has previously resided. Social Security Numbers will remain confidential pursuant to 193.074, Florida Statutes.

Notice: A tax lien can be imposed on your property pursuant to 196.161, Florida Statutes.

Section 196.161 (1) provides:

(1) (a) "When the estate of any person is being probated or administered in another state under an allegation that such person was a resident of that state and the estate of such person contains real property situate in this state upon which homestead exemption has been allowed pursuant to s. 196.031 for any year or years within 10 years immediately prior to the death of the deceased, then within 3 years after the death of such a person the property appraiser of the county where the real property is located shall, upon knowledge of such fact, record a notice of tax lien against the property among the public records of that county, and the property shall be subject to the payment of all taxes exempt thereunder, plus 15 percent interest per year, a penalty of 50 percent of the unpaid taxes for each year, unless the circuit court having jurisdiction over the ancillary administration in this state, determines that the decedent was a permanent resident of this state during the year or years an exemption was allowed, whereupon the lien shall not be filed or, if filed, shall be canceled of record by the property appraiser of the county where the real estate is located. (b) In addition, upon determination by the property appraiser that for any year or years within the prior 10 years a person who was not entitled to a homestead exemption from ad valorem taxes, it shall be the duty of the property appraiser making such determination to serve upon the owner a notice of intent to record in the public records of the county a notice of tax lien against any property owned by that person in the county, and such property shall be identified in the notice of tax lien. Such property which is situated in this state shall be subject to the taxes exempted thereby, plus a penalty of 50 percent of the unpaid taxes for each year and 15 percent interest per annum. Before any such lien may be filed, the owner so notified must be given 30 days to pay the taxes, penalties and interest.

I understand I cannot claim a residency based exemption, or Tax Credit (lottery credit, star exemption, rebate, or rollback) in another state or county and receive the Homestead Exemption in Charlotte County, in accordance with section 196.031 (5), Florida Statutes.

If a property owner fails to notify the Property Appraiser and it is determined the owner was not entitled to receive Homestead Exemption for any year or years within the prior 10 years, the property shall be subject to any taxes exempted within those years, plus 50% penalty and 15% interest per annum in accordance with section 196.161, Florida Statutes.

Examples:

*Renting your property would likely forfeit your right to claim a Homestead Exemption.

*If the homestead owner dies and the property continues to receive a Homestead Exemption.

*You purchase a property and the Notice of Proposed Property Taxes (TRIM) OR Tax Bill continues in prior owner's name.

*You or your married spouse is simultaneously claiming Homestead Exemption on another property. Rule 12D-7.012(2), Florida Administrative Code, states, "No family unit shall be entitled to more than one homestead tax exemption".

I hereby certify, and acknowledge as single person or married family unit.

Signature _____

Signature _____