

## APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION FOR

Property ID: _____	Property Type: _____	Geo ID: _____
Legal Description: _____		

<b>Step 1:</b> <b>Owner's name and address</b> (attach sheets if needed)  Percent Ownership in Property: _____ Other Owner's Name(s) (if any): _____	Telephone: _____ Birth Date**: _____ Driver's License Number, Personal ID Certificate, or Social Security Number*: _____  Other Owner's Percent Ownership: _____
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<b>Step 2:</b> <b>Describe your property</b>	Give street address if different from above, or legal description if no street address. _____ <b>MOBILE HOMES</b> - Give make, model, and identification number. Attach a copy of statement of ownership from the Texas Department of Housing and Community Affairs if home is 8'X40' or larger and document has not been cancelled, or attach a verified copy of the purchase contract that shows you are the owner of the mobile home. Make: _____ Model: _____ Identification #: _____  OPTIONAL - Number of acres used for residential purposes (yard, garden, garage, etc. ) _____ Acres
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<b>Step 3:</b> <b>Check exemptions that apply to you</b>	<input type="checkbox"/> <b>GENERAL RESIDENTIAL EXEMPTION:</b> You qualify for this exemption if (1) you owned this property on Jan 1; (2) you occupied it as your principle residence on Jan 1; and (3) you and your spouse have not claimed a residence homestead exemption on any other property.
	<input type="checkbox"/> <b>OVER-65 EXEMPTION:</b> You qualify for this exemption if you are 65 years of age or older. You can't claim a disability exemption if you claim this exemption. See back of this form for more information about tax limitations or qualification dates. Check if you will transfer a tax ceiling from your last home .....Yes [ ] No [ ]
	<input type="checkbox"/> <b>DISABILITY EXEMPTION:</b> You qualify for this exemption if you qualify for the general homestead exemption and on January 1 you were under a disability for the purposes of payment of disability benefits under the federal Old Age, Survivors 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. See back of this form for more information about tax limitations or qualification dates. Check if you will transfer a tax ceiling from your last home .....Yes [ ] No [ ]
	<input type="checkbox"/> <b>OVER-55 SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE OVER-65 EXEMPTION:</b> You qualify for an extension of the over-65 exemptions and the school tax limitation if (1) you are 55 years of age or older on the date your spouse died; (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. See the back of this form for more information about tax limitations or qualification dates.  Deceased Spouse's Name: _____ Date of Death: _____ Check if you will transfer a tax ceiling from your last home .....Yes [ ] No [ ]

<b>Step 4: Answer if applies</b>	<b>COOPERATIVE HOUSING RESIDENTS:</b> Do you have an exclusive right to occupy this unit because you own stock in a cooperative housing corporation? Yes [ ] No [ ]
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<b>Step 5: Check if late</b>	<input type="checkbox"/> Application for homestead exemption for prior tax year _____. You must have met all of the qualifications checked above to receive the prior year exemption.
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<b>Step 6: Sign and date the application</b>	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.  Authorized Signature: _____ Date: _____ <b>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.</b>
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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 as authorized by Section 11.48(b), Tax Code.

\*\* Tax Code Section 11.43(m) allows a person who qualifies for a general homestead exemption to receive the 65 or older person exemption without applying when he/she becomes age 65 as shown on the application in the district's records.

# APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION INSTRUCTIONS

**General Residential Homestead Applications.** 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 his form, call the appraisal district. A list of taxing units and the exemptions they offer is listed below.

**Over-65 Exemption or Disability Exemptions.** You may receive the over-65 or disability homestead exemptions immediately upon qualification for the exemption(s). If you have not provided your birthdate on this application, 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 the 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 the 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 are not entitled to continue the school tax limitation; however, you will be entitled to continue the school tax limitation if your spouse died on or after January 1, 2003.

**Filing Deadlines :** File the 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 exemption 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 are 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.

The following table lists each taxing jurisdiction that offers residential homestead exemptions:

JURISDICTION	STATE MANDATED HOMESTEAD	LOCAL OPTION HOMESTEAD	STATE MANDATED OVER 65 HS	LOCAL OPTION OVER 65 HS	STATE MANDATED DISABILITY
Walker County				12,000	
Huntsville ISD	15,000		10,000	6,000	10,000
Walker County Hospital				12,000	
Huntsville City				12,000	
New Waverly ISD	15,000		10,000		10,000
New Waverly City				12,000	
Riverside City				12,000	
Richards ISD	15,000		10,000		10,000
Elkins/City				12,000	