



**APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION**

**NOTE:** You are required to give us the information requested 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. To complete this form, see the instructions on the back of this form.

**LEGAL DESCRIPTION:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**ACCOUNT NUMBER:** \_\_\_\_\_

**JURISDICTIONS:** \_\_\_\_\_

**PROPERTY ADDRESS:** \_\_\_\_\_

**NOTE:** If property address is not correct, please show correct address here: \_\_\_\_\_

**APPLICANT INFORMATION:**

\_\_\_\_\_  
 \_\_\_\_\_  
 \_\_\_\_\_

**# of Acres used for homestead purposes:** \_\_\_\_\_

**MOBILE HOMES:** Give size, make, model and serial number: \_\_\_\_\_

Section 11.432 of the Tax Code **requires** a mobile home owner to provide a copy of a document of title & location from the Texas Department of Housing & Community Affairs to the Appraisal District when applying for a homestead exemption.

<b>Birth Date:</b>		<b>Driver's License # or ID #:</b>		<b>Social Security #:</b>	
<b>Phone #:</b>		<b>Mobile or Cell Phone #:</b>		<b>Percent Ownership:</b>	
<b>Other Owner's Names(s) if any:</b>				<b>Other Owner's Percent Ownership:</b>	

**Please check the appropriate boxes:**

Yes  No Is this application for a prior tax year? **NOTE:** You must have met all of the qualifications checked below to receive the prior year tax exemption!

\_\_\_\_\_ (year) **GENERAL RESIDENTIAL HOMESTEAD:** You qualify for this exemption if (1) you owned this property on January 1; (2) you occupied it as your principal residence on January 1 and (3) you or your spouse have not claimed a residence homestead exemption on any other property.

\_\_\_\_\_ (year) **OVER-65 EXEMPTION:** 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. You must apply within one (1) year of the date you acquired the home if you were 65 or older when you acquired and occupied the home as your principal residence, or within one (1) year of the date of your 65<sup>th</sup> birthday if you already owned the home and turned 65 after January 1. This exemption also includes a school tax limitation, or ceiling.

\_\_\_\_\_ (year) **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 within one (1) year of the date you acquired the home if your onset date of disability benefits was established before you acquired and occupied the home as your principal residence, or within one (1) year of the onset date of disability benefits if you already owned the home. This exemption also includes a school tax limitation, or ceiling (effective January 1, 2004).

\_\_\_\_\_ (year) **OVER-55 SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE OVER-65 OR DISABILITY EXEMPTION:** You qualify for an extension of these exemptions and the School Tax Limitation if (1) you were 55 years of age or older on the date your spouse died and (2) your deceased spouse was receiving these exemptions on this residence homestead or would have applied and qualified for the exemptions in the year of the spouse's death.

Deceased Spouse's Name	Date of Death
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Yes  No Will you be transferring a tax ceiling from your last home? If so, **you must request a "School Tax Ceiling Certificate"** from the Appraisal District in which your last home was located and submit it to this Appraisal District.

**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.**

Applicant's Signature	Date	Notary Public or CAD Employee	Date
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**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**

## APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION INSTRUCTIONS

**General and Over-55 Surviving Spouse Residential Homestead Exemptions:** You may only apply for residence homestead exemptions on **one (1)** 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 (1) you do not establish another principal residence, (2) you intend to return and occupy the residence and (3) you are temporarily absent for a period of less than two years. Condition #3 became effective June 18, 2003 and excludes homeowners in military service or in a facility providing services related to health, infirmity or aging. The Appraisal District office may request proof of eligibility.

**Over-65 and Disability Exemptions:** You may receive the Over-65 or the 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 on June 1 or your onset date of disability is 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 exemption(s). This special provision only applies to the Over-65 and Disability exemptions and not to other exemptions for which you may apply.

**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 delinquency date for the tax year (effective June 20, 2003). See the Over-65 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. 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.

### **Please verify that:**

1. The **Legal Description** of the property you wish to claim as your homestead is correct on the front side of this form.
2. The **Property Address** (if printed on the front side of this form) is correct. If it is not correct or does not appear, please provide the correct property address. The address provided should be the address assigned by the 9-1-1 addressing office for your area. If you do not know your 9-1-1 address, please contact the 9-1-1 addressing office for Jim Wells County at (361)668-1464 to obtain your 9-1-1 address.
3. The **Mailing Address** shown on the front side of this card is correct. If it is not correct, please provide the correct mailing address.

### **Please provide the following information for the person applying for homestead:**

1. The **number of acres** you use for homestead purposes (yard, garden, garage, etc). The Tax Code mandates that a residential homestead exemption can be applied to a structure together with "the land that is designed or adapted" for human residence. Our office will automatically allow up to one (1) acre for homestead purposes. For any acreage more than one (1) acre, the property will be field inspected by an appraiser from our office.
2. For **mobile homes**, the **size, make model and serial number**. This information can be found on a Certificate of Title for a mobile home. Section 11.432 of the Tax Code **requires** a mobile home owner to provide a copy of a document of title & location from the Texas Department of Housing & Community Affairs to the Appraisal District.
3. **Date of birth**.
4. **Driver's license or personal ID number and/or social security number**. Section 11.48 requires the appraisal district to keep this information confidential if provided on an exemption application (effective September 1, 2003).
5. **Home phone number**. Please indicate whether or not the phone number is for a mobile or cell phone by placing the number in the appropriate box on the front side of this form. Section 11.48 requires the appraisal district to keep this information confidential if provided on an exemption application (effective September 1, 2003).
6. **Percentage of ownership** of the property being claimed as homestead.
7. **Any other owner's** of the property and **their percentage of ownership**.

### **Check the appropriate boxes that apply to you:**

1. If you check the **"Yes"** box indicating you will be transferring a tax ceiling from you last home, **submit a "School Tax Ceiling Certificate"** along with this application.
2. If you check the **Disability exemption** box, **submit documentation verifying your disability** along with this application. If you are receiving disability benefits through the Social Security office, contact that office and request a verification letter for tax purposes that will indicate the **onset date of benefits**. The exemption will not be considered until a current benefits letter is provided.

### **Sign and date the application:**

You must sign and date this application. **Your signature must be witnessed** by a Notary Public or by an employee of the Jim Wells County Appraisal District. 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 Sec. 37.10

If you would like to know the homestead exemptions offered by your taxing units, please contact the Jim Wells County Appraisal District office by phone at (361)668-9656, in person at 1600 E Main St Ste #100B or by mail at PO Box 607, Alice, TX 78333-0607.