



Commissioner of the Revenue
Leslie L. "Les" Hall
 10644 Buckley Hall Road, Liberty Square
 P.O. Box 896
 Mathews, Virginia 23109-0896
 (804) 725-7168 FAX (804) 725-7603
 e-mail LHALL@MATHEWSCOUNTYVA.GOV



APPLICATION FOR TAX RELIEF FOR THE ELDERLY & DISABLED PERSONS MATHEWS COUNTY, VIRGINIA

PROPERTY DESCRIPTION	
Tax Map #	
Land Value	\$
Improvement Value	\$
Total Value	\$

OWNER INFORMATION	
Owner's Name	
Co-Owner's Name	
Mailing Address	
Date(s) of Birth	/
Phone Number(s)	/

INCOME	DOLLAR AMOUNT
Owner's Combined Annual Income	
Co-Owner's Combined Annual Income	
Relative(s) Living in Home	
Relative(s) Living in Home	
Relative(s) Living in Home	
TOTAL COMBINED ANNUAL INCOME	\$

We, the undersigned, declare this to be a true and accurate statement of our total income during the immediately preceding calendar year from ALL sources. Any applicant making a false statement to obtain tax relief under this ordinance shall be deemed guilty of a misdemeanor and, upon conviction, shall be punishable by a fine to exceed \$200.00

 Signature of Owner Date

 Signature of Co-Owner Date

 Signature of Relative Living in the Home Date

PERSONAL FINANCIAL STATEMENT

ASSETS	DOLLAR AMOUNT
Cash on Hand (Checking & Savings)	\$
Certificates of Deposit	
Stocks, Bonds, Mutual Funds	
Notes Receivable	
Personal Property	
Real Estate (other than primary home)	
Other Assets	
TOTAL ASSETS	\$

LIABILITIES	DOLLAR AMOUNT
Current Debt (credit cards, accounts)	\$
Notes/Taxes Payable	
Real Estate Mortgages	
Other Liability (specify)	
Other Liability (specify)	
TOTAL LIABILITIES	\$
NET WORTH	\$

We, the undersigned, declare this to be a true and accurate statement of our financial condition on the 31st day of December 20____. Any applicant making a false statement to obtain tax relief under this ordinance shall be deemed guilty of a misdemeanor and, upon conviction, shall be punishable by a fine to exceed \$200.00.

Signature of Owner Date

Signature of Co-Owner Date

Signature of Relative Living in the Home Date

COUNTY OF MATHEWS, VIRGINIA
REAL ESTATE TAX RELIEF FOR THE ELDERLY REQUIREMENTS

- Property owner must have attained the age of 65 OR have been determined to be permanently or totally disabled as of January 1st of the current tax year.
- Real Estate must be used as the property owner's personal dwelling. Any property owner residing in a health care facility for extended periods with this property being their sole dwelling will not be disqualified due to their treatment.
- Property owner must have a total household income not exceeding \$35,000 (excluding up to \$4,000 of the income of any relative living other than spouse in the household). The income of the owner and spouse of the dwelling must be reported in full.
- Disabled property owners shall receive up to \$5,000 of their disability income exempted from the income requirement.
- Property owner must have a total net worth not to exceed \$100,000 (excluding the value of the improvements and contiguous land not to exceed 5.00 acres)
- Total real estate tax relief cannot exceed \$1,000 annually

AUTHORIZATION FOR INVESTIGATION

We, the undersigned, hereby give consent and permission to any government agency, any corporation, financial institution, retirement system or other source of income to me, to release to the Commissioner of the Revenue of Mathews County, Virginia, any information that may be requested for ascertaining my eligibility for relief under the Real Estate Tax Exemption Ordinance of Mathews County, Virginia.

Signature of Owner

Date

Signature of Co-Owner

Date

Signature of Relative Living in the Home

Date