



Jennifer Brown
Commissioner of the Revenue

GOOCHLAND COUNTY, VIRGINIA

Real Estate Tax Relief for Seniors or Disabled

Office of the Commissioner of the Revenue

PO Box 60
1800 Sandy Hook Rd
Goochland, VA 23063

www.Goochlandva.us
Tel: (804)556-5807
Fax: (804)556-2483



FILING DEADLINE IS MARCH 1, 2017



Name on Tax Bill:	Map #:	Account:
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GENERAL INFORMATION AND REQUIREMENTS

- ❖ The Senior applicant must be **65** years old or older by **December 31, 2016** and **reside on the property**. If ownership is shared with persons other than the spouse, all such owners must live on the premises to qualify.
- ❖ The Disabled applicant must be **permanently and totally disabled by December 31, 2016**. Certified proof of such disability must be provided. Acceptable types of proof include a statement from Social Security, Veterans Administration, or Railroad Retirement Board, or an affidavit from two (2) medical doctors.
- ❖ The applicant must be an owner of the property on December 31 of the preceding year. If the applicant is in a hospital or other extended care facility on December 31, they may still qualify if the house is not rented or leased for consideration. All owners, except a spouse, must reside on the property and it must be their sole dwelling.
- ❖ Gross combined income of all owners and relatives living in the home cannot exceed **\$67,000**. The income of all relatives living in the house must be included; however, up to \$10,000 from each non-owner relative (not spouse or other co-owners) may be excluded.
- ❖ Combined financial worth of the applicant, co-owners, and spouses may not exceed **\$250,000**. The value of the house and up to ten (10) acres of land on the same parcel is excluded from your net worth.
- ❖ The person qualifying shall be exempted from the amount of real estate taxes assessed against such property in an amount not to exceed eight hundred dollars (**\$800.00**).
- ❖ Full Applications are required every three years. Between those three years, a signed affidavit will be required to continue your tax relief status. If there has been a significant change in your income or assets you must immediately notify the Commissioner of the Revenue so you may complete another full application.

GOOCHLAND COUNTY, VIRGINIA

Real Estate Tax Relief for Senior or Disabled Application

If you require assistance in completing this form, we can assist you in person (without appointment) at the Administration Building, 1800 Sandy Hook Rd Suite 230, Goochland VA or by telephone at 804-556-5807 or by a visit to your residence (by appointment).

Street Address of Property: _____

Mailing Address – if different: _____

Applicant: _____
Last Name First Middle

Birth Date: _____
Month Day Year

Phone: _____

Spouse: _____
Last Name First Middle

Birth Date: _____
Month Day Year

Phone: _____

GOOCHLAND COUNTY, VIRGINIA

Real Estate Tax Relief for Senior or Disabled Application

Complete the following questions.

1. Is the property occupied by the applicant as his/her sole dwelling? Yes ____ No ____

2. What is Applicant's Ownership? (Check the appropriate space.)

100% Owner (with or without Spouse) ____ **Partial Owner** ____

If a Partial Owner, please list all other owners and each owner's percentage of ownership.

List name(s) of all owners, their percentage of ownership and if the house is the sole dwelling.

Applicant		Percentage of Ownership		Yes or No
Name	DOB	Percentage of Ownership		Sole Dwelling
_____ Name	_____ DOB	_____ Percentage of Ownership	_____ Yes or No	_____ Sole Dwelling
_____ Name	_____ DOB	_____ Percentage of Ownership	_____ Yes or No	_____ Sole Dwelling
_____ Name	_____ DOB	_____ Percentage of Ownership	_____ Yes or No	_____ Sole Dwelling

3. Are there any relatives of the applicant or their spouse living in the residence? Yes ____ No ____

If yes, please complete the following for relatives over the age of 18:

Name	Relationship	Age
_____	_____	_____
_____	_____	_____
_____	_____	_____
_____	_____	_____

4. Are any of the above acting as a caregiver of the applicant and/or spouse? Yes ____ No ____

In accordance with Goochland County Code §13-64, the Commissioner of the Revenue shall make any other reasonably necessary inquiries of persons seeking an exemption under this division, requiring answers under oath, to determine the qualification for such exemption. For such purpose, the Commissioner may require the production of certain supporting documentation including, but not limited to income tax returns and related forms, social security documents, and bank statements to establish the income or financial worth of any applicant for relief.

GROSS INCOME – Report the total GROSS INCOME during 2016, by source, for the applicant, spouse, and all other co-owners or relatives living in the dwelling. If more than one relative lives in the dwelling, use the last column or combine numbers. If there is no income for a specific line, enter “0”.

We will add the numbers for you if you would like. If you have questions, please call us at 804-556-5807.

INCOME – Annual Gross Dollars, No Decimals	Applicant	Spouse or Co-Owner	Relative, (Exclude a Caregiver)	Others - Write Name		
Salaries, Wages, etc. (W-2)	\$	\$	\$	\$		
Pensions & Annuities	\$	\$	\$	\$		
Social Security or Railroad Retirement (before deductions)	\$	\$	\$	\$		
Interest & Dividends	\$	\$	\$	\$		
IRA Distributions	\$	\$	\$	\$		
Capital Gains	\$	\$	\$	\$		
Rental Income	\$	\$	\$	\$		
Public Assistance (IE: EBT, Unemployment Benefits, etc.)	\$	\$	\$	\$		
Gifts Received / Prizes Won - (substantial)	\$	\$	\$	\$		
Other - including Self Employment	\$	\$	\$	\$		
Sub-Total	\$	\$	\$	\$		
Less up to \$10,000 from applicant & relative's Inc.	\$	N/A	\$	N/A	\$ (10,000)	\$ (10,000)
TOTAL GROSS INCOME	\$	\$	\$	\$		

TOTAL HOUSEHOLD INCOME (add the totals from the above line) \$

NET WORTH – Net worth is calculated by subtracting your liabilities from your assets. Use the value as of December 31, 2016 for each category listed below.

We will add the numbers for you if you would like. If you have questions, please call us at 804-556-5807.

Value of Assets (exclude your Goochland residence)	Applicant	Spouse or Co-Owner	Other Co-Owner(s)
Other Real Estate located in Goochland County	\$	\$	\$
Real Estate located outside of Goochland County (attach copy of tax bill)	\$	\$	\$
Motor vehicles, boats, trailers, campers, etc.	\$	\$	\$
Checking & Money Market Account Balances	\$	\$	\$
Savings Account Balance(s)	\$	\$	\$
Certificates of Deposit (CD's)	\$	\$	\$
Stocks, Bonds, Mutual Funds, etc.	\$	\$	\$
Life Insurance (only the Cash Value, if any)	\$	\$	\$
Worker's Compensation Benefits	\$	\$	\$
IRAs, Annuities, 401K Plans (Balances)	\$	\$	\$
Other Assets (i.e. Trust Accounts)	\$	\$	\$
TOTAL ASSETS (A)	\$	\$	\$
Balance of Liabilities			
Notes Payable Balance – unpaid balance of bank loans for vehicles, boats, etc.	\$	\$	\$
Credit Card & Merchant Balances	\$	\$	\$
Mortgage Balance – do not include mortgage on property you are requesting tax relief	\$	\$	\$
Federal, State or Local Taxes PAST Due	\$	\$	\$
Other Debt – unpaid balance due doctors, dentist, hospital, etc.	\$	\$	\$
TOTAL LIABILITIES (B)	\$	\$	\$
TOTAL NET WORTH SUBTRACT LIABILITIES (B) FROM ASSETS (A)	\$	\$	\$

TOTAL HOUSEHOLD NET WORTH (add the totals from the above line) \$

AFFIDAVIT FOR REAL ESTATE TAX RELIEF

I do hereby declare that my income and net worth are true and correct to the best of my knowledge and belief and that the property is my sole residence. Any person, who knowingly falsely claims an exemption shall be guilty of a misdemeanor and upon conviction thereof, may be punished by a fine not to exceed \$1,000 or confinement in jail not to exceed twelve months or both.

Applicant's Email Address: _____

_____ Signature of Applicant	_____ Date Signed	_____ Telephone Number
_____ Signature of Witness (other than spouse)	_____ Date Signed	_____ Telephone Number

The application will be returned if the applicant has not signed and/or the signature has not been witnessed by another adult other than your spouse. **If a person is signing with a Power of Attorney, please indicate this on the signature line and include a copy of the Power of Attorney with the application.**

AUTHORIZATION FOR RELEASE OF INFORMATION

Virginia State Code §58.1-3 does not allow the release of confidential information “except in accordance with a proper judicial order or as otherwise provided by law”. Without your explicit approval, this office will not release any information regarding the application to anyone other than the applicant.

If you wish to authorize the Commissioner of the Revenue or his staff to discuss the information contained in your application with any person(s) other than you (the applicant) and authorize such person(s) to receive information regarding your eligibility for this program, please complete the section below. You have the right to revoke this authorization at any time by submitting a written request to our office.

I, or my authorized representative, request that the person specifically named below, as well as agents representing me, including, but not limited to, Real Estate Agents, a Closing Attorney, or a Mortgage Company Representative, be allowed to receive or discuss confidential information pertaining to this application.

Name of Contact Person _____
Address of Contact Person _____
Telephone of Contact Person _____
Email of Contact Person _____

Applicant Signature Authorizing this Release

Date