



Application for Residence Homestead Exemption

To complete this form, see the instructions on back of this form.

2010

YEAR

Bexar Appraisal District

(210) 224-2432

Appraisal District's Name

Phone (Area code and number)

411 N. Frio, P.O. Box 830248 San Antonio, Tx 78283-0248

Address

For appraisal district office use only Legal Description

Parcel Number

STEP 1: Owner's name and address (attach sheets if needed).

Owner's Name (person completing application)

Mailing address

City, town or post office, state, ZIP code

Phone (area code and number)

Driver's License, Personal ID Certificate, or Social Security Number*

Birth Date**

Percent Ownership in Property

Other Owner's Name(s) (if any)

Other Owner's Percent Ownership

STEP 2: Describe your property.

Street address (if different from above, or legal description if no street address; include property account number, if available)

Number of acres (not to exceed 20) used for residential occupancy of the structure, if the land and structure have identical ownership.

_____ acres

MOBILE HOMES-Give make, model and identification number: _____

Attach a copy of statement of ownership and location issued by the Texas Department of Housing and Community Affairs if home is 8'x40' or larger, or attach a verified copy of the purchase contract that shows you are the owner of the mobile home unless your title information appears on the Texas Department of Housing and Community Affairs' Web site. If so, the appraisal district may use the Web site documents to verify your eligibility.

*You are required to give us this information on this form in order to perform tax related functions for this office. Tax Code Section 11.43 authorizes this office to request this information 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 appraisal district's records or in information available to the appraisal district.

STEP 3: Check exemptions that apply to you.

- GENERAL RESIDENCE EXEMPTION:**
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.
- AGE 65 OR OLDER EXEMPTION:**
You qualify for this exemption if you are 65 years of age or older. You cannot claim a disability exemption if you claim this exemption. More information about tax limitations or qualification dates may be found on the next page.
- DISABILITY EXEMPTION:**
You qualify for this exemption if you are/were 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 age 65 or older exemption if you claim this exemption. More information about tax limitations or qualification dates, and documentation requirements may be found on the next page.
- 100% DISABLED VETERANS EXEMPTION:**
You qualify for this exemption if you are a disabled veteran who receives from the United States Department of Veterans Affairs (VA) or its successor (1) 100 percent disability compensation due to a service-connected disability; and (2) a rating of 100 percent disabled or a determination of individual unemployability from the VA. Attach a copy of your award letter or other document from the United States Department of Veterans Affairs.
- AGE 55 OR OLDER SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE AGE 65 OR OLDER EXEMPTION:**
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 age 65 or older exemption on this residence homestead or would have applied and qualified for the exemption in the year of the spouse's death. More information about tax limitations or qualification dates may be found on the next page.

Deceased Spouse's Name _____ Date of Death _____
- Check if you will transfer a tax ceiling from your last home. (Attach the tax ceiling certificate if transferring from another county.)

STEP 4: Answer if applies.

COOPERATIVE HOUSING RESIDENTS:
Do you have an exclusive right to occupy this unit because you own stock in a cooperative housing corporation? Yes No

STEP 5: Check if late.

- Application for homestead exemption for prior tax year _____.
You must have met all of the qualifications checked above to receive the prior year exemption.

STEP 6: Sign and date the application.

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

sign here ➔

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.

More Information

Tax Exemptions, Limitations and Qualification Dates

- **General Residence Homestead:** You may only apply for residence homestead exemptions on one property in a tax year. A homestead exemption may include up to 20 acres of land that you actually use in the residential use (occupancy) of your home. Arbitrary factors that are unrelated to that use, such as acreage limits, matching legal descriptions, and contiguous parcels, may not be considered in determining if the land qualifies. To qualify for a homestead exemption, 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 outside the U.S. or in a facility providing services related to health, infirmity or aging may exceed the two year period.
- **Age 65 or Older or Disability:** You may receive age 65 or older 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 age 65 or older or disability exemption(s). This special provision only applies to age 65 or older or disability exemptions and not to other exemptions for which you may apply. You must provide a disability letter or other documentation under Federal Old-Age Survivors, and Disability Insurance to qualify for a disability homestead exemption. Call the appraisal district for information about the district's requirements.
- **100% Disabled Veterans:** Beginning in 2009, certain disabled veterans are eligible for 100% exemptions for their residence homesteads. Documentation from the Department of Veterans Affairs (VA) must be submitted to prove that the veteran receives full VA compensation and is either rated as 100% disabled or has a determination of unemployability from the VA.
- **Surviving Spouse:** You qualify for an extension of the exemption for persons age 65 and older if (1) you are 55 years of age or older on the date your spouse died and (2) your deceased spouse was receiving the age 65 or older 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 age 65 or older exemption unless your spouse died on or after December 1, 1987. You will not qualify for a disability exemption or a 100% disabled veteran exemption claimed by your deceased spouse. You are not entitled to continue the school tax limitation; however, you will be entitled to continue the local option county, city or junior college limitation.
- **Tax Limitations:** The age 65 or older 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 who are disabled or 65 years of age or older.
- **Filing Deadlines:** File this application between January 1 and April 30. You may file a late homestead exemption application if you file it no later than one year after the tax delinquency date. See the age 65 or older or disability section for more on late filing.
- **Re-filing:** If the chief appraiser grants your application exemption, you do not need to reapply annually. You must reapply, however, if the chief appraiser requires you to do so by sending 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. If, however, your application information indicates that your age is 65 or older, or the appraisal district has access to other information that proves you qualify, you need not re-file for the aged 65 or older exemption. To ensure the earliest possible qualification without reapplication, the older spouse should complete the application for a married couple.
- **Transfer of Tax Limitation or Ceiling:** Please call the appraisal district if you will transfer a tax ceiling to your new home.

Instructions

How to Complete the Application

Fill out this application completely.
If you have trouble filling out this form, call the appraisal district.

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 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 were eligible for an exemption last year, check the box in Step 5 for late filing for 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.

Step 7: Mail.

Mail to the appraisal district where the property is located.

*Note to Appraisal District

Attach a page listing those exemptions,
OR

State:

If you would like to know the homestead exemptions offered by your taxing units, call the _____
_____ Appraisal District at _____
_____.)