

YEAR

**APPLICATION FOR CHARITABLE ORGANIZATION PROPERTY TAX EXEMPTION**

Appraisal district name <b>Bexar Appraisal District</b>	Phone (area code and number) <b>(210) 224-8511</b>
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Address  
**PO BOX 830248: San Antonio, TX 78282-0240 or 411 N. Frio, San Antonio, TX 78207**

This application covers property you owned on January 1 of this year or acquired during this year. If you owned the property January 1, you must file the completed form between January 1 and no later than April 30 of this year. If you acquire the property after January 1 of this year and wish to qualify for the exemption this year, you must apply **before** the first anniversary of the date you acquired the property or before the first anniversary of the date any property was acquired after January 1. Be sure to attach any additional documents requested. If the chief appraiser grants the exemption, you do not need to reapply annually, but you must reapply if the chief appraiser requires you to do so, or if you want the exemption to apply to property not listed in this application. You must notify the chief appraiser in writing if and when your right to this exemption ends. Return the completed form to the address above.

<b>Step 1: Name and address of organization, identify person preparing application</b>	Name of organization		
	Present mailing address		
	City, town or post office, state, ZIP Code		Phone (area code and number)
	Name of person preparing this application	Driver's License, Personal I.D. Certificate, or Social Security Number†:	Title

<b>Step 2: Form of organization</b>	Operator of organization (check appropriate box) <input type="checkbox"/> Individual <input type="checkbox"/> Foundation <input type="checkbox"/> Corporation <input type="checkbox"/> Trust			
	If operated by a corporation, is the corporation non-profit as defined by the Texas Non-Profit Corporation Act (art. 1396-1.01 VACS et. seq.)? ..... Yes <input type="checkbox"/> No <input type="checkbox"/>			

<b>Step 3: Answer these questions about the organization</b>	1. Is the overall purpose of the organization to perform exclusively religious, charitable, scientific, literary or educational functions? ..... Yes <input type="checkbox"/> No <input type="checkbox"/>		
	2. Check the appropriate box(es) if any of the following statements describe a function performed by the organization.		
	Provide medical care without regard to ability to pay.* .....		<input type="checkbox"/>
	Provides support or relief to orphaned, delinquent, dependent or handicapped children who need residential care, or to abused or battered spouses or children in need of temporary shelter, or to the impoverished, or to victims of natural disaster without regard to ability to pay.* .....		<input type="checkbox"/>
	Provides services to elderly persons or to the handicapped including the provision of recreation or social activities and facilities designed to address the special needs of elderly persons or the handicapped without regard to ability to pay.** .....		<input type="checkbox"/>
	Preserves a historical landmark or site. ....		<input type="checkbox"/>
	Promotes or operates a museum, zoo, library, theater of the dramatic or performing arts, symphony orchestra or choir. ....		<input type="checkbox"/>
	Promotes or provides humane treatment of animals. ....		<input type="checkbox"/>
	Acquires, stores, transports, sells or distributes water for public use. ....		<input type="checkbox"/>
	Answers fire alarms and extinguishes fire with little or no compensation paid to members. ....		<input type="checkbox"/>
	Promotes the athletic development of boys or girls under the age of 18 years.* .....		<input type="checkbox"/>
	Promotes educational development through student loans or scholarships. ....		<input type="checkbox"/>
	Provides halfway house services if certified as a halfway house by the Board of Pardons and Paroles.* .....		<input type="checkbox"/>
	Provides permanent housing and related social, health care and educational facilities for persons 62 years of age or older without regard to ability to pay. ....		<input type="checkbox"/>
	Preserves or conserves wildlife. ...		<input type="checkbox"/>
Promotes or operates an art gallery, museum or collection in a permanent location or on tour that is open to the public. ....		<input type="checkbox"/>	
Provide housing on a cooperative basis to students of an institution of higher education. ....		<input type="checkbox"/>	

**Step 3:**  
**Answer these**  
**questions**  
**about the**  
**organization**  
**(continued)**

Operates a television station that produces or broadcasts educational, cultural or other public interest programming and that receives grants from the Corporation for Public Broadcasting. [47 U.S.C.A. sec. 396\*].....

Provides housing and services to people 62 years old or older in a retirement community that provides independent and assisted living services and nursing services to residents on a single campus, without regard to ability to pay or in which at least 4 percent of community's combined net resident revenue is provided in charitable care to its residents. ....

Provides housing for low-income and moderate-income families, for unmarried individuals 62 years old or older, for handicapped individuals, and for families displaced by urban renewal, through the use of trust assets irrevocably dedicated, through a contract entered into before December 31, 1972, for the sale of housing to a charitable organization performing the athletic development of boys and girls under 18 years.\* .....

Provides for the organized solicitation of gifts and grants to non-profit human services organizations. If this function is checked, answer the following questions. ....

a. Does the organization have a volunteer board of directors?..... Yes  No

b. Is the organization affiliated with a state or national organization that authorizes, approves or sanctions volunteer fundraising organizations? ..... Yes  No

c. Does the organization qualify for exemption under Sec. 501(c)(3), Internal Revenue Code, as amended?..... Yes  No

d. Does the organization distribute contributions to at least five other organizations which (1) use the funds for charitable purposes; (2) are governed by volunteer boards of directors; (3) qualify for exemption under Sec. 501(c)(3), Internal Revenue Code, as amended; (4) receive a majority of their revenue from charitable gifts and government agencies; and (5) provide services without regard to their beneficiaries' ability to pay? If yes, attach a list of organizations. .... Yes  No

Performs biomedical or scientific research or scientific education for benefit of the public.\* .....

\* A corporation that performs a function that is marked with an asterisk(\*) does not have to be organized as a non-profit corporation.

\*\* A charitable organization that performed this function must engage primarily in performing the described function, but may engage in other activities that support or are related to its charitable functions.

3. Does the organization perform, or does its charter permit it to perform, any functions other than those checked in question 2? ..... Yes  No

If "YES," attach a statement describing the other functions in detail.

4. In the past year has the organization loaned funds to, borrowed funds from, sold property to or bought property from a shareholder, director or member of the organization, or has a shareholder or member sold his interest in the organization for a profit?..... Yes  No

If "YES," attach a description of each transaction. For sales, give buyer, seller, price paid, value of the property sold and date of sale. For loans, give lender, borrower, amount borrowed, interest rate and term of loan. Attach a copy of note, if any.

5. Attach a list of salaries and other compensation for services paid in the last year. Also list any funds distributed to members, shareholders or directors in the last year. In each case, give recipient's name, type of service rendered or reason for payment and amounts paid.

<p><b>Step 4:</b> Answer these questions about the organization's bylaws or charter</p>	<p>Attach a copy of the charter, bylaws or other documents adopted by the organization which govern its affairs, and answer the following questions.</p> <p>1. Does the organization use its assets in performing the organization's charitable functions or the charitable function of another charitable organization? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>2. Does the charitable organization divide responsibility with another organization? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p style="padding-left: 20px;">If "YES," is that organization</p> <p style="padding-left: 40px;">1. exempt from federal income taxation under Section 501(a), Internal Revenue Code of 1986, as an organization described by Section 501(c)(3) of that code;</p> <p style="padding-left: 40px;">2. meet the criteria for a charitable organization under Section 11.18(e) and (f) Texas Tax Code; and</p> <p style="padding-left: 40px;">3. under common control with the charitable organization? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>3. Do these documents direct that on the discontinuance of the organization the organization's assets are to be transferred to the state of Texas, to the United States, or to an educational, religious, charitable or other similar organization that is qualified for exemption under Section 501(c)(3), Internal Revenue Code, as amended? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p style="padding-left: 20px;">If "YES," give the page and paragraph numbers.                      Page _____ Paragraph _____</p> <p style="padding-left: 20px;">If "NO," do these documents direct that on discontinuance of the organization the organization's assets are to be transferred to its members who have promised in their membership applications to immediately transfer them to the State of Texas, to the United States, or to an educational, religious, charitable or other similar organization that is qualified for exemption under Sec. 501(c)(3), Internal Revenue Code, as amended? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p style="padding-left: 20px;">If "YES," give the page and paragraph numbers.                      Page _____ Paragraph _____</p> <p style="padding-left: 20px;">If "YES," was the two-step transfer required for the organization to qualify for exemption under Sec. 501(c)(3), Internal Revenue Code, as amended? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p>				
<p><b>Step 5:</b> Describe your property</p>	<p>PROPERTY TO BE EXEMPT:</p> <ul style="list-style-type: none"> <li>• Attach one Schedule A (REAL PROPERTY) form for <b>EACH</b> parcel of real property to be exempt.</li> <li>• Attach one Schedule B (PERSONAL PROPERTY) form listing <b>ALL</b> personal property to be exempt.</li> <li>• List only property owned by the organization.</li> </ul>				
<p><b>Step 6:</b> Sign the application</p>	<ul style="list-style-type: none"> <li>• <b>By signing this application, you designate the property described in the attached Schedules A and B as the property against which the charitable organization exemption may be claimed in this appraisal district.</b></li> <li>• <b>You certify that this information is true and correct to the best of your knowledge and belief.</b></li> </ul> <table border="1" style="width: 100%; border-collapse: collapse; margin-top: 10px;"> <tr> <td style="width: 70%; padding: 5px;">On behalf of (name of organization)</td> <td style="width: 30%; padding: 5px;">Date</td> </tr> <tr> <td style="padding: 5px;"> <div style="display: flex; align-items: center;"> <div style="margin-right: 5px;"><b>sign here</b> ➔</div> <div>Authorized signature</div> </div> </td> <td style="padding: 5px;">Title</td> </tr> </table> <p style="margin-top: 10px;"><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></p>	On behalf of (name of organization)	Date	<div style="display: flex; align-items: center;"> <div style="margin-right: 5px;"><b>sign here</b> ➔</div> <div>Authorized signature</div> </div>	Title
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† You are required to give us this information 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. 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.

**Schedule A: Description of real property**

- Complete one Schedule **A** form for **EACH** parcel qualified for exemption.
- Attach all completed schedules to your application for exemption.

Name of owner									
Legal description of property									
			Appraisal district account number (Optional):						
Describe the primary use of this property									
<p>Is the property currently under active construction or physical preparation?..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If under construction, when will construction be completed? (date) _____ ***</p> <p>If under physical preparation, check which activity the organization has done. (Check all that apply.)</p> <table style="width:100%; border: none;"> <tr> <td><input type="checkbox"/> Architectural work</td> <td><input type="checkbox"/> Land clearing activities</td> </tr> <tr> <td><input type="checkbox"/> Engineering work</td> <td><input type="checkbox"/> Site improvement work</td> </tr> <tr> <td><input type="checkbox"/> Soil testing</td> <td><input type="checkbox"/> Environmental or land use study</td> </tr> </table> <p>Is the incomplete improvement designed and intended to be used exclusively by the qualified charitable organization? Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>Does any portion of this property produce income? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p> <p>If "Yes," attach a statement describing use of the revenue.</p> <p>Is the land on which the incomplete improvement is located reasonably necessary for the use of the improvement in the operation of the association/organization? ..... Yes <input type="checkbox"/> No <input type="checkbox"/></p>				<input type="checkbox"/> Architectural work	<input type="checkbox"/> Land clearing activities	<input type="checkbox"/> Engineering work	<input type="checkbox"/> Site improvement work	<input type="checkbox"/> Soil testing	<input type="checkbox"/> Environmental or land use study
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<input type="checkbox"/> Engineering work	<input type="checkbox"/> Site improvement work								
<input type="checkbox"/> Soil testing	<input type="checkbox"/> Environmental or land use study								
List all other individuals and organizations that used this property in the past year, and give the requested information for each.									
NAME	DATES USED	ACTIVITY	RENT PAID, IF ANY						

Continue on additional sheets as needed.

\*\*\* An incomplete improvement exempted for the three years preceding the 2003 tax year is entitled to exemption for the 2003 tax year regardless of whether the property owner applies for the exemption for the 2003 tax year if the property otherwise qualifies. The chief appraiser may require the property owner to file an applicaiton to confirm the owner's qualification for exemption for the 2003 tax year. An exemption for an incomplete improvement is for five years. Effective January 1, 2006, the exemption will revert back to three years.

