



Sworn Statement of Adjusted Gross Income of Household and Return
Senior Citizen Exemption For Persons Age 65 and Over

DR 501SC
R. 12/02

Section 196.075 (4)(d), Florida Statutes

Application Year
[] INITIAL
[] RENEWAL

This statement and return must be completed annually and signed by applicants for the Exemption for Persons 65 and over, Section 196.075, Florida Statutes. This statement and return must be filed with the property appraiser on or before March 1st.

Folio:
Name:
Address:

Part A: Names of all persons residing in housing unit comprising homestead (excluding renters and boarders) for which exemption is requested. Complete for all members living in your household. (For additional parties please attach a separate sheet.)

Table with 5 columns: Name, Date of Birth, Social Security Number, Does Person File Federal Income Tax Return?, Adjusted Gross Income*

Total Adjusted Gross Income for all Household members \$

*NOTE: If a person does not file an IRS return, he/she must complete and attach Part E of this form.

Part B:

[] No, I (we) do not file a Federal Income Tax Return Form 1040. I (we) agree to submit Social Security Statement (SSA 1099) before June 1; and I (we) attach IRS Form 4506, Request for Copy or Transcript of Tax Form, to prove household members are not required to file tax return with IRS. Complete Part E, Statement of Income, for all members living in your household. (Attach additional sheet for each household member.)

Part C:

[] Yes, I (we) file Federal Income Tax Return Form 1040 series. I (we) agree to submit a copy of Form 1040 or Form 4868, Application for Automatic Extension of Time to File U.S. Individual Income Tax Return, if applicable, and the Wage and Tax Statement (W-2 Form) for review by the Property Appraiser. Attach prior year federal income tax return(s) and Wage and Tax Statement(s) (W-2) for all persons listed above. Prior year's IRS 1040 Form or Form 4868 should be submitted by May 1 for prompt consideration and no further documentation will be accepted after June 1.

Part D:

I hereby authorize the Property Appraiser's Office to obtain information from utility companies and other sources necessary to determine my continuing eligibility for the exemption(s) applied for. NOTE: If all information is not received by June 1st, your application will not be processed.

I hereby certify that I am at least 65 years of age as of January 1 of the year for which this exemption is applied (attach proof of age) and that the total prior year adjusted gross income of all persons living in the household on January 1 of the year for which this exemption is applied does not exceed the adjusted gross income as defined in s. 62 of the United States Internal Revenue Code. You must contact your county property appraiser to obtain the maximum household adjusted gross income amount. This amount is subject to change each year.

I hereby make application for the exemptions indicated and affirm that I do qualify for same under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property described above. I understand that section 196.131(2), Florida Statutes, provides that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding 1 year or a fine not exceeding \$5,000 or both. Further, under penalties of perjury, I declare that I have read the foregoing application and Statement of Adjusted Gross Income and the facts in it are true and correct.

Applicant's Signature Phone Number Date

*Supporting documentation is not required to be submitted if you are filing for renewal of the additional homestead exemption, unless requested by the Property Appraiser. Before filing for renewal, contact the Property Appraiser's office for instructions.