

2020 APPLICATION FOR RESIDENTIAL HOMESTEAD EXEMPTION

Para asistencia en Español
llame al (817)284-4063



Return completed application to:
TARRANT APPRAISAL DISTRICT
EXEMPTION DIVISION
PO BOX 185579
FORT WORTH, TX 76181-0579

TAD USE ONLY – BAR CODE HERE

TAD USE ONLY – RECEIPT STAMP HERE



**ACCOUNT #:

**PIDN:

**CLASSCODE

PLEASE PROVIDE THE FOLLOWING:

**DAYTIME PHONE #:

DATE OF BIRTH:

*EMAIL ADDRESS:

There is no fee for filing an application. Failure to complete all applicable parts and attach all required documentation may result in denial of the exemption.
DUTY TO NOTIFY: If the chief appraiser grants the exemption(s), you do not need to reapply annually. You must reapply if the chief appraiser requires you to do so, or if you want the exemption to apply to property not listed on this application. You must notify the chief appraiser in writing before May 1 of the year after your right to this exemption ends.

STEP 1 – THIS APPLICATION APPLIES TO THIS PROPERTY

**Legal description and street address _____	**Deed filing information (date, volume and page or instrument number) _____
--	--

MANUFACTURED HOME

Make _____ <small>(see important information page for required documentation)</small>	Model _____	ID Number _____
--	-------------	-----------------

STEP 2 – MARITAL STATUS

Is the owner of the property: a Married Couple a Single Person Separate Individuals
If separate individuals, each occupant must make application. % Ownership Interest _____

STEP 3 – OWNER INFORMATION

State the tax year for which you are applying for this exemption. _____
Do you own and live in the property for which you are seeking this residence homestead exemption? Yes ____ No ____
On what day did you begin occupying this property as your principal residence? (MM/DD/YYYY) _____
Are you claiming a homestead exemption on another property? Yes ____ No ____
If 'Yes', please provide the address of the other property: _____
Do you own other residential property in Texas? Yes ____ No ____
If yes, please list the county(ies) and address(es) of location: _____
If the property is in Tarrant County, the exemption will be removed and applied to this property. If it is not, documentation from the other appraisal district must be sent with this application verifying removal.

Heir Property: Is the applicant identified on deed or other recorded instrument? Yes ____ No ____
If yes, provide the Court record/filing number on recorded deed or other recorded instrument _____
If no, required documentation must be provided. (see important information page)
Is the property for which this application is submitted an heir property? (see important information page)
Do other heir property owners occupy the property? Yes ____ (affidavits required) No ____
Cooperative Housing: Do you have an exclusive right to occupy this property because you own stock in a cooperative housing corporation? Yes ____ No ____
If yes, state name of cooperative housing corporation? _____
Is any portion of the property for which you are claiming a residence homestead exemption income producing? Yes ____ No ____
If yes, indicate the percentage of the property that is income producing: _____ percent
Number of acres (or fraction of an acre, not to exceed 20 acres) you own and occupy as your principal residence: _____ acres

IMPORTANT: Pursuant to Tax Code Section 11.43(j), you are required to furnish a copy of the following: Texas driver's license or Personal Identification Certificate. **Section 11.43, subsection (n) prohibits a chief appraiser from allowing a homestead exemption unless the addresses on the required forms of identification match the address for which the exemption is claimed.** Please indicate that you request that the chief appraiser waive the requirement that the address on the application and your driver's license correspond because:

- Is an active duty member of the armed forces of the United States or the spouse of an active duty member and the applicant includes with the application a copy of the applicant's or spouse's military identification card and a copy of a utility bill for the property subject to the claimed exemption in the applicant's or spouse's name; or
- Holds a driver's license issued under Section 521.121c or 521.1211, Transportation Code, and includes with the application a copy of the application for that license provided to the Texas Department of Transportation.
- I am a resident of a facility that provides health, infirmity, or aging. Facility Name _____ Phone _____
- I am certified for participation in the address confidentiality program administered by the Office of the Texas Attorney General under Subchapter C, Chapter 56, Code of Criminal Procedure.

The chief appraiser is required to keep the information confidential and not open to public inspection, except to appraisal office employees who appraise property as authorized by Section 11.48(b), Tax Code.

STEP 4 – CHECK THE EXEMPTIONS THAT APPLY TO YOU

- GENERAL RESIDENCE HOMESTEAD** (Tax Code Section 11.13(a), (b)): You may qualify for this exemption if: (1) you owned this property on Jan. 1; (2) you occupied it as your principal residence on Jan. 1; and (3) you and your spouse do not claim a residence homestead exemption on any other property.
- AGE 65 OR OLDER** (Tax Code Section 11.13(c), (d)): You may qualify for this exemption if you are 65 years of age or older. This exemption is effective Jan. 1 of the tax year in which you become age 65. An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units.
- DISABLED PERSON** (Tax Code Section 11.13(c), (d)): To qualify for this exemption, you must be under a disability for purposes of payment of disability insurance benefits under federal Old-Age, Survivors and Disability Insurance Act . To establish your eligibility, attach copies of either: (1) a currently dated award letter from Social Security Administration that states the date you became disabled; or (2) a completed TAD Physician’s Statement for Disability Form #5205 [you may obtain form #5205 at www.tad.org or call 817-284-4063]; or [To obtain a copy from Social Security, telephone 1-800-772-1213.] You may receive this exemption in addition to the exemptions provided in 11.13(a), (b), General Residence Homestead. An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units.
- 100% DISABLED VETERAN** (Tax Code Section 11.131(b)): You may qualify for this exemption if you are a disabled veteran who receives from the United States Department of Veterans Affairs or its successor: (1) 100 percent disability compensation due to a service- connected disability; and (2) a rating of 100 percent disabled or individual unemployability. Attach a copy of your current award letter or other document from the Department of Veterans Affairs showing 100% compensation due to a service-connected disability, including effective date of service connected disability and a rating of 100% disabled or of individual unemployability. This exemption is immediate upon qualification for the applicable portion of the tax year. Is the disability a permanent total disability as determined by the U.S. Department of Veterans Affairs under 38 C.F.R. Section 4.15? Yes ___ No ___
- SURVIVING SPOUSE OF DISABLED VETERAN WHO QUALIFIED OR WOULD HAVE QUALIFIED FOR THE 100% DISABLED VETERAN** (Tax Code Section 11.131(c), (d)): You may qualify for this exemption if you were married to a disabled veteran who qualified for an exemption under Tax Code Section 11.131(b) at the time of his or her death or would have qualified for the exemption if the exemption had been in effect on the date the disabled veteran died and: (1) you have not remarried since the death of the disabled veteran and (2) the property was your residence homestead when the disabled veteran died and remains your residence homestead. **Documentation must be provided to support this exemption request.**
Name of Deceased Spouse _____ Date of Death _____
- OVER-55 SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE OVER-65 OR DISABLED PERSON** (Tax Code Section 11.26, 11.261): provides for continuance of established tax ceilings on the county, county college, city and school for a spouse of a deceased individual who qualified for the disabled person or over-65 exemption. You qualify for an extension of the over 65 exemptions if you were 55 years of age or older on the date your spouse died and your spouse was receiving the age 65 exemption on this residence. You cannot receive this exemption if you receive an exemption under Tax Code Section 11.13(d). **Documentation must be provided to support this exemption request.**
Name of Deceased Spouse _____ Date of Death _____
- DONATED RESIDENCE HOMESTEAD OF PARTIALLY DISABLED VETERAN** (Tax Code Section 11.132(b)): You may qualify for this exemption if you are a disabled veteran with a disability rating of less than 100 percent. An exemption from taxation of a percentage of the appraised value of the disabled veteran’s residence homestead equal to the disabled veteran’s disability rating if the residence homestead was donated to the disabled veteran by a charitable organization: (1) at no cost to the disabled veteran; or (2) at some cost to the disabled veteran in the form of a cash payment, a mortgage, or both in an aggregate amount that is not more than 50 percent of the good faith estimate of the market value of the residence homestead made by the charitable organization as of the date the donation is made. **Please attach all documents that support your request. Percent Disability Rating _____**
- SURVIVING SPOUSE OF DISABLED VETERAN WHO QUALIFIED FOR THE DONATED RESIDENCE HOMESTEAD** (Tax Code Section 11.132(c), (d)): You may qualify for this exemption if you were married to a disabled veteran who qualified for an exemption under Tax Code Section 11.132(b) at the time of his or her death and: (1) you have not remarried since the death of the disabled veteran and (2) the property was your residence homestead when the disabled veteran died and remains your residence homestead. **Please attach all documents to support your request.**
- SURVIVING SPOUSE OF MEMBER OF ARMED FORCES KILLED IN ACTION** (Tax Code Section 11.133(b), (c)): You may qualify for this exemption if you are the surviving spouse of a member of the United States armed services who is killed in action and you have not remarried since the death of the member of the armed services. **Please attach all documents to support your request.**
- SURVIVING SPOUSE OF A FIRST RESPONDER KILLED WHILE ON DUTY** (Tax Code Section 11.134(b)): You may qualify for this exemption if you are the surviving spouse of a first responder who is killed or fatally injured in the line of duty. The surviving spouse is entitled to an exemption from taxation of the total appraised value of the surviving spouse’s residence homestead if the surviving spouse: (1) is an eligible survivor for purposes of Chapter 615, Government Code, as determined by the Employees Retirement System of Texas under that chapter; and (2) has not remarried since the death of the first responder. **Please attach all documents to support your request.**

Tax Limitation Exemption Transfer. Place an ‘x’ or check mark in the space beside the type of tax limitation or surviving spouse exemption transfer you seek from your previous residence homestead and the address of the last residence homestead to the right:

- | | |
|---|---|
| <input type="checkbox"/> Tax limitation (Tax Code Section 11.26(h) or 11.261 (h)) | Address of last residence homestead: |
| <input type="checkbox"/> 100% Disabled Veteran’s Exemption (Tax Code Section 11.131(d)) | Address _____ |
| <input type="checkbox"/> Donated Residence Homestead of Partially Disabled Veteran (Tax Code Section 11.132(d)) | City _____ |
| <input type="checkbox"/> Member of Armed Forces Killed in Action (Tax Code Section 11.133c) | State & Zip _____ |
| <input type="checkbox"/> First Responder Killed While on Duty (Tax Code Section 11.134) | County _____ |

NOTICE REGARDING PENALTIES FOR MAKING OR FILING AN APPLICATION CONTAINING A FALSE STATEMENT: If you make a false statement on this form, you could be found guilty of a Class A misdemeanor or a state jail felony under Penal Code Section 37.10. By signing this application you state that each fact contained in this application is true and correct; (2) that I/the property owner meet(s) the qualifications under Texas law for the residence homestead exemption for which I am applying; (3) that I do not claim an exemption on another residence homestead in Texas or claim a residence homestead exemption on a residence homestead outside Texas; and (4) that have read and understand the *Notice Regarding Penalties for Making or Filing an Application Containing a False Statement.*”

Applicant’s Signature _____ Date Signed _____

Important Information

GENERAL INSTRUCTIONS

This application is for claiming residence homestead exemptions pursuant to Tax Code Sections 11.13, 11.131, 11.132, 11.133, 11.134 and 11.432. Certain exemptions may also require Form 50-114-A. The exemptions apply only to property that you own and occupy as your principal place of residence.

FILING INSTRUCTIONS

File this form and all supporting documentation with the Tarrant Appraisal District attention Exemption Division at PO Box 185579 Fort Worth, TX 76181-0579 by mail or in person between Jan. 1 and April 30 of the year for which the exemption is requested. An Exemptions Specialist will gladly assist in answering your questions for free and may be contacted by calling (817) 284-4063.

APPLICATION DEADLINES

Generally, the completed application and required documentation is due no later than April 30 of the year for which the exemption is requested.

The due date for person's age 65 or older; disabled; or partially disabled veterans with donated homesteads to apply for the exemption is no later than the first anniversary of the qualification date.

A late application for a residence homestead exemption may be filed up to two years after the deadline for filing has passed. (Tax Code Section 11.431)

If the chief appraiser grants the exemption(s), property owner does not need to reapply annually, but must reapply if the chief appraiser requires it, unless seeking to apply the exemption to property not listed in this application.

Property owners already receiving a general residence homestead exemption who turn age 65 in that next year are not required to apply for age 65 or older exemption if accurate birthdate information is included in the appraisal district records.

REQUIRED DOCUMENTATION

Attach a copy of property owner's driver's license or state-issued personal identification certificate. The address listed on the driver's license or state-issued personal identification certificate must correspond to the property address for which the exemption is requested. Property owners who reside in certain facilities or participate in a certain address confidentiality program may be exempt from this requirement. The chief appraiser may waive the requirements for certain active duty U.S. armed services members or their spouses or holders of certain driver's licenses.

Heir property is property owned by one or more individuals, where at least one owner claims the property as a residence homestead, and the property was acquired by will, transfer on death deed, or intestacy. An heir property owner not specifically identified as the residence homestead owner on a deed or other recorded instrument in the county where the property is located must provide:

- an affidavit establishing ownership of interest in the property (See Form 114-A);
- a copy of the prior property owner's death certificate;
- a copy of the property's most recent utility bill; and
- A citation of any court record relating to the applicant's ownership of the property, if available.

Each heir property owner who occupies the property as a principal residence, other than the applicant, must provide an affidavit that authorizes the submission of this application (See Form 50-114-A).

Manufactured homeowners must provide:

- a copy of the Texas Department of Housing and Community Affairs statement of ownership showing that the applicant is the owner of the manufactured home;
- a copy of the sales purchase agreement, other applicable contract or agreement or payment receipt showing that the applicant is the purchaser of the manufactured home; or
- a sworn affidavit (see Form 50-114-A) by the applicant indicating that:
 1. the applicant is the owner of the manufactured home;
 2. the seller of the manufactured home did not provide the applicant with the applicable contract or agreement; **and**
 3. the applicant could not locate the seller after making a good faith effort.

Property owned by a Trust

Since the applicant must meet the definition of a qualifying trust, it is necessary that you furnish pages from the trust that show and establish the following information:

1. The name of the trust.
2. The name of the trustor.
3. The trustor's right to use and occupy as his principal residence rent free and without charge except for taxes and other costs and expenses specified in the instrument: (i) for life; (ii) for the lesser of life or a term of years; or (iii) until the date the trust is revoked or terminated by an instrument that describes the property with sufficient certainty to identify it and is recorded in the real property records of the county in which the property is located.
4. The trustor's notarized signature.

If you prefer, you may bring your trust documentation to our customer service section and we will make the necessary copies for you.

An Exemptions Specialist will gladly assist in answering your questions for free and may be contacted by calling (817) 284-4063. Exemptions offered by taxing units may be found at www.tad.org.

ADDITIONAL INFORMATION REQUEST

The chief appraiser may request additional information to evaluate this application. Property owner must comply within 30 days of the request or the application will be denied. The chief appraiser may extend this deadline for a single period not to exceed 15 days for good cause shown. (Tax Code Section 11.45)

DUTY TO NOTIFY

Property owner must notify the chief appraiser in writing before May 1 of the year after his or her right to this exemption ends.

EXEMPTION QUALIFICATIONS

General Residence Homestead Exemption (Tax Code Section 11.13(a) and (b))
Property was owned and occupied as owner's principal residence on Jan. 1. No residence homestead exemption can be claimed by the property owner on any other property.

Disabled Person Exemption (Tax Code Section 11.13(c) and (d))
Persons under a disability for purposes of payment of disability insurance benefits under Federal Old-Age, Survivors, and Disability Insurance. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit or other compelling evidence establishing the applicant's ownership interest in the homestead. (See Form 50-114-A) An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

Age 65 or Older Exemption (Tax Code Section 11.13(c) and (d))
This exemption is effective Jan. 1 of the tax year in which the property owner becomes age 65. Property owners not identified on a deed or other instrument recorded in the applicable real property records as an owner of the residence homestead must provide an affidavit or other compelling evidence establishing the applicant's ownership interest in the homestead. (See Form 50-114-A) An eligible disabled person age 65 or older may receive both exemptions in the same year, but not from the same taxing units. Contact the appraisal district for more information.

Surviving Spouse of an Individual Who Qualified for Age 65 or Older Exemption (Tax Code Section 11.13(q)):

Surviving spouse of person who qualified for the age 65 or older exemption may receive this exemption if the surviving spouse was 55 years of age or older when the qualifying spouse died. The property must have been the surviving spouse's residence homestead at the time of death and remain the surviving spouse's residence homestead. This exemption cannot be combined with an exemption under 11.13(d).

100 Percent Disabled Veterans Exemption (Tax Code Section 11.131(b))
Property owner who receives a 100 percent disability compensation due to a service-connected disability and a rating of 100 percent disabled or individual employability from the U.S. Department of Veterans Affairs or its successor. Documentation must be provided to support this exemption request.

Surviving Spouse of a Disabled Veteran Who Qualified or Would Have Qualified for the 100 Percent Disabled Veteran's Exemption (Tax Code Section 11.131(c) and (d))

Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.131(b) at the time of his or her death or would have qualified for the exemption if the exemption had been in effect on the date the disabled veteran died) who has not remarried since the death of the veteran. The property must have been the surviving spouse's residence homestead at the time of the veteran's death and remain the surviving spouse's residence homestead.

Donated Residence Homestead of Partially Disabled Veteran (Tax Code Section 11.132(b))

A disabled veteran with a disability rating of less than 100 percent with a residence homestead donated by a charitable organization at no cost or at some cost that is not more than 50 percent of the good faith estimate of the market value of the residence homestead as of the date the donation is made. Documentation must be provided to support this exemption request.

Surviving Spouse of a Disabled Veteran Who Qualified for the Donated Residence Homestead Exemption (Tax Code Section 11.132(c) and (d)): Surviving spouse of a disabled veteran (who qualified for an exemption under Tax Code Section 11.132(b) at the time of his or her death) who has not remarried since the death of the disabled veteran and maintains the property as his or her residence homestead.

Surviving Spouse of a Member of Armed Services Killed in Action (Tax Code Section 11.133(b) and (c))

Surviving spouse of a U.S. armed services member who is killed in action who has not remarried since the death of the service member. Documentation must be provided to support this exemption request.

Surviving Spouse of a First Responder Killed in the Line of Duty (Tax Code Section 11.134)

Surviving spouse of a first responder who is killed or fatally injured in the line of duty who has not remarried since the death of the first responder. Documentation must be provided to support this exemption request.