

Documents for REAL ESTATE TAX RELIEF

The following documents may be necessary to complete your application

Current Gross Income Not to Exceed \$88,202:

- **Signed** Copy of your **2022** Federal Income Tax Return (Form 1040/1040SR and ALL Schedules)
 - *If not required to file a tax return, provide all 2022 Forms W-2, 1099-R, etc., verifying all sources of income.*
- **2022** Social Security Benefit Statement (Form SSA-1099).
- **2022** Form W-2 for all Wages/Salaries.
- **2022** Form 1099-R for all Retirement Pensions/Annuities.
- **2022** Form 1099-R for all Distributions from any Tax Deferred/Tax Sheltered Accounts (IRA, 401k, 403b, 457 Deferred Comp, Tax Sheltered Annuities, Thrift Savings Plan, etc.).
- **2022** Form 1099-INT/DIV for interest/dividends earned on all bank accounts, investment accounts, stocks, redeemed savings bonds, etc.
- **Signed** Copy of your **2022** Trust Federal Tax Returns.
- **Signed** Copy of your **2022** Business Federal Tax Returns for Corporations, Partnerships and Limited Liability Companies.
- **2022** Disability Income (From Permanent Full/Partial or Temporary Disabilities).
- **Signed** copies of **2022** Federal Income Tax Returns and ALL SUPPORTING DOCUMENTS for all additional relatives residing in the home.
**If not required to file a tax return, provide all 2022 Forms W-2, 1099-R, etc., verifying all sources of income.*

Assets Not to Exceed \$350,000:

- All pages of the **December 2022** bank statements with history transactions and balances of all bank accounts (Checking, Savings, Money Market, etc.) **through 12/31/2022**. This may require your **January 2023 statement**.
- All pages of the **December 2022** financial statements with history transactions and balances of all Investment Accounts (Stocks, Bonds, Mutual Funds, Roth IRA's, Certificate of Deposits, etc.) **through 12/31/2022**.
- All pages of the **December 2022** financial statements with history transactions and balances of all Tax Deferred/Tax Sheltered Accounts **through 12/31/2022** (IRA, 401K, 403b, 457 Deferred Comp, Tax Sheltered Annuities, Thrift Savings Plans, etc.)
- Documentation verifying the value for tax year **2022** of any automobiles, trucks, boats, trailers, motor homes, etc., owned, or co-owned, registered in Virginia or elsewhere.
- Documentation verifying the value for tax year **2022** of any additional Real Estate you own or co-own located in Virginia or elsewhere. Please provide documentation verifying the balance(s) of the mortgage(s) on **12/31/2022** for all additional property.

IF NOT ALREADY PROVIDED:

Disabled Persons under the Age of 65:

- Award Letter from Social Security, US Railroad Retirement Board or Veterans Administration.
- Provide our "Physician's Certification" form from two different doctors stating "total and permanent disability" as per **§58.1-3217** of the Code of Virginia.

Other Supporting Documents:

- Death Certificate of deceased spouse whose name still appears on the ownership of the property.
- Copy of Power of Attorney for applicant (s) if someone else is making this application for you.

Documents for PERSONAL PROPERTY TAX RELIEF

The following documents may be necessary to complete your application

Current Gross Income Not to Exceed \$29,500:

- **Signed** Copy of your **2022** Federal Income Tax Return (Form 1040/1040SR and ALL Schedules)
 - *If not required to file a tax return, provide all 2021 Forms W-2, 1099-R, etc., verifying all sources of income.*
- **2022** Social Security Benefit Statement (Form SSA-1099).
- **2022** Form W-2 for all Wages/Salaries.
- **2022** Form 1099-R for all Retirement Pensions/Annuities.
- **2022** Form 1099-R for all Distributions from any Tax Deferred/Tax Sheltered Accounts (IRA, 401k, 403b, 457 Deferred Comp, Tax Sheltered Annuities, Thrift Savings Plan, etc.).
- **2022** Form 1099-INT/DIV for interest/dividends earned on all bank accounts, investment accounts, stocks, redeemed savings bonds, etc.
- **Signed** Copy of your **2022** Trust Federal Tax Returns.
- **Signed** Copy of your **2022** Business Federal Tax Returns for Corporations, Partnerships and Limited Liability Companies.
- Disability Income (From Permanent Full/Partial or Temporary Disabilities).
**If not required to file a tax return, provide all 2022 Forms W-2, 1099-R, etc., verifying all sources of income.*

Assets Not to Exceed \$70,000:

- All pages of the **December 2022** bank statements with history transactions and balances of all bank accounts (Checking, Savings, Money Market, etc.) **through 12/31/2022**. This may require your **January 2023 statement**.
- All pages of the **December 2022** financial statements with history transactions and balances of all Investment Accounts (Stocks, Bonds, Mutual Funds, Roth IRA's, Certificate of Deposits, etc.) **through 12/31/2022**.
- All pages of the **December 2022** financial statements with history transactions and balances of all Tax Deferred/Tax Sheltered Accounts **through 12/31/2022** (IRA, 401K, 403b, 457 Deferred Comp, Tax Sheltered Annuities, Thrift Savings Plans, etc.)
- Documentation verifying the value for tax year **2022** of any automobiles, trucks, boats, trailers, motor homes, etc., owned, or co-owned, registered in Virginia or elsewhere.
- Documentation verifying the value for tax year **2022** of any additional Real Estate you own or co-own located in Virginia or elsewhere. Please provide documentation verifying the balance(s) of the mortgage(s) on **12/31/2022** for all additional property.

IF NOT ALREADY PROVIDED:

Disabled Persons under the Age of 65:

- Award Letter from Social Security, US Railroad Retirement Board or Veterans Administration.
- Provide our "Physician's Certification" form from two different doctors stating "total and permanent disability" as per §58.1-3506.3 of the Code of Virginia.

Other Supporting Documents:

- Death Certificate of deceased spouse whose name still appears on the ownership of the property.
- Copy of Power of Attorney for applicant (s) if someone else is making this application for you.