



# IMPERIAL POLK COUNTY Property Appraiser

Marsha M. Faux, CFA, ASA  
www.polkpa.org

You may use this form to apply for the Senior Exemption for persons 65 or Older.

**Please see the qualifications and instructions listed below to assist you with the completion of this application.**

- All applications for the 2010 tax year must be filed by March 1, 2010. If the applicant does not have all income documentation by March 1, the application should be submitted without it. Verification of income will be accepted through June 1, 2010.
- You must own the property and establish your permanent residence thereon as of January 1<sup>st</sup> of the year in which you are seeking the exemption, and be receiving homestead exemption.
- You must be 65 years of age as of January 1<sup>st</sup> of the year in which you are seeking the exemption and provide proof of age.
- Your household income cannot exceed an amount determined annually by the State of Florida Department of Revenue. The allowable amount of household income you can receive is increased each year. For example, for the 2010 tax year the allowable adjusted household income received during 2009 was \$25,780. The following link will provide you with more information regarding Adjusted Gross Income [http://www.law.cornell.edu/uscode/26/uscode\\_sec\\_26\\_00000062----000-.html](http://www.law.cornell.edu/uscode/26/uscode_sec_26_00000062----000-.html)
- Applicants and persons living in the household who file a Federal Tax Return must:
  - Complete the **Sworn Statement of Adjusted Gross Income**.
  - Provide a **copy of tax returns (Form 1040 or 1040A) and supporting W-2 and 1099 forms** for income received during the prior year
- Applicants and persons living in the household who are not required to file a Federal Tax Return must:
  - Complete the **Sworn Statement of Adjusted Gross Income**.
  - Provide copies of all **W-2, 1099 forms and other statements of income from Social Security, pensions, earned interest, etc.**, that show income received during the prior year.

Best regards,

A handwritten signature in black ink that reads 'Marsha Faux'.

Marsha Faux, CFE, ASA  
Property Appraiser



**IMPERIAL  
POLK COUNTY  
Property Appraiser**

Marsha M. Faux, CFA, ASA  
www.polkpa.org

**Limited Income Senior Exemption Application for Persons Age 65 and Older  
Application Year 2010**

PROPERTY I.D. :

Tax District:

PROPERTY LOCATION:

Household Members Print name(s) in blanks below	Marital Status	Do you file a Federal Income Tax return?	Date of Birth	Social Security Number
		___ Yes ___ No		
		___ Yes ___ No		
		___ Yes ___ No		
		___ Yes ___ No		

Earned income	\$ _____	Income from retirement plans	\$ _____
Taxable investment income	\$ _____	Income from pensions	\$ _____
Interest income	\$ _____	Income from trust funds	\$ _____
Rents	\$ _____	Capital gains (losses)	\$ _____
Royalties	\$ _____	Taxable Veteran's Admin. Benefits	\$ _____
Dividends	\$ _____	Other (specify)	\$ _____
Annuities	\$ _____		\$ _____
Taxable Social Security Benefits	\$ _____	<b>TOTAL ANNUAL HOUSEHOLD INCOME</b>	\$ _____

- For each household member who checked YES submit a copy of the 2009 IRS 1040 and ALL 1099 forms by June 1, 2010
- For each household member who checked NO submit copies of ALL 1099 forms by June 1, 2010

I hereby certify that I am at least 65 years of age as of the year for which this exemption is applied and the total prior years adjusted gross income of all persons residing, excluding renters and boarders, on the property as of January 1<sup>st</sup> does not exceed statutory limitations. 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 any 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 penalty of perjury, I declare that I have read the foregoing sworn statement of household income and the facts are true and correct. I hereby authorize the Property Appraiser's Office to obtain information from sources necessary to determine my continuing eligibility for the exemption.

**THIS APPLICATION MUST BE SIGNED AND RETURNED TO THE POLK COUNTY PROPERTY APPRAISER'S OFFICE ON OR BEFORE MARCH 1, 2010.**

\_\_\_\_\_  
Applicant 1

\_\_\_\_\_  
Applicant 2

\_\_\_\_\_  
Date

\_\_\_\_\_  
Applicant 3

\_\_\_\_\_  
Applicant 4

\_\_\_\_\_  
Phone Number