



Charles E. Hackney
Manatee County Property Appraiser

IMPORTANT INFORMATION

Dear Property Owner:

Congratulations on your recent purchase of property in Manatee County. There are several personal tax exemptions that may be available to you as a residential property owner if you qualify and **apply for them by mail or in person by the MARCH 1 DEADLINE**. If the application is mailed, it must be postmarked no later than March 1. In order to qualify for homestead exemption, **permanent Florida residency must be established as of January 1.** Please note that the application for homestead exemption also serves as the application for the additional homestead exemption.

If the tax notice on the property you have recently purchased reflects a homestead exemption, it may have been granted to the previous owner. If you move to a different residence, you must reapply for the exemption. Once your exemption is granted, it will automatically renew each year as long as there are no changes in status. This also applies to properties with an Agricultural Classification (Greenbelt). The exemption or classification is granted to the individual not the property. **You must reapply by mail or in person as the new owner.**

For your convenience there is a homestead exemption application with instructions included with this letter which explains how and where to apply for **homestead exemption** or other personal exemptions. You may also be eligible to transfer the "Save Our Homes" cap from your previous homestead property to your new homestead property. Please see the Homestead Portability section in the instructions. Brochures and frequently asked questions (FAQ's) on homestead, the Save Our Homes Amendment, low income seniors exemptions and Portability are available on our website. If you have any questions or would like a brochure, please contact our office at 941.748.8208 or by e-mail at manateepao@mymanatee.org.

Sincerely,

Charles E. Hackney
Manatee County Property Appraiser

Enclosures

INSTRUCTIONS FOR COMPLETING HOMESTEAD APPLICATION - MAIL-IN FORM

(Use additional form for more than two applicants.)

Under Florida law, failure to file homestead exemption by March 1, 2011 constitutes a waiver of the exemption privilege for the year.

YOU MUST OWN AND ESTABLISH YOUR PERMANENT RESIDENCE ON THE PROPERTY **ON OR BEFORE JANUARY 1, 2011** AND **LEGIBLE COPIES** OF THE FOLLOWING DOCUMENTATION MUST BE PROVIDED:

- All owners applying should provide required information in columns one (1) and two (2) using additional forms as needed.
- Florida driver license or, **if you do not drive**, a Florida identification card.
- Florida vehicle tag number(s), for all vehicles owned or leased by you, **OR** Manatee County voter registration card, if you are registered to vote.
- If you are not a United States citizen, a Resident Alien Card is required.
- If title to the property on which you are applying is held in a trust, a copy of the entire trust agreement or a recorded Memorandum of Trust must be submitted, with the application.
- If you are married and your spouse is not filing for homestead, the following information should be provided under column two(2):

The fields that need to be completed are:

- Name
- Mailing address
- Phone number
- Marital status
- Social security number
- Date of birth
- Did you receive homestead or other benefits anywhere last year?

NOTE: This is not a complete listing of the requirements for establishing Florida Residency. If you do not have either a Manatee voter registration or Florida vehicle tag number, contact our office for a list of acceptable alternate documents.

HOMESTEAD PORTABILITY: If you had a Florida homestead in 2009 or 2010, you may be eligible to transfer the Save Our Homes cap from your previous homestead property to your new homestead property. A portability application (Transfer of Homestead Assessment Difference DR-501T) form must be completed and submitted by the **March 1st** deadline. This form is available for download on our website (www.manateepao.com) or by calling 941.748.8208.

If you purchased a new home after January 1, 2010 and you are a resident of Manatee County, you may qualify for a savings on your 2011 tax bill by filing for homestead exemption no later than March 1, 2011.

NOTE: If you are filing on a mobile home, proof of ownership (title or registration) is required for both the mobile home and the real property. A "Real Property" application (Form DR-402) must also be submitted. The Form DR-402 may also be obtained from our website.

AFTER COMPLETING YOUR HOMESTEAD APPLICATION, PLEASE SIGN, DATE AND MAIL IT ALONG WITH THE REQUIRED DOCUMENTATION TO:

Manatee County Property Appraiser
Attn: Homestead Exemptions
P.O. Box 1338
Bradenton, FL 34206
941.748.8208

UPON REVIEW OF YOUR APPLICATION, YOU WILL RECEIVE EITHER A COPY OF THE COMPLETED APPLICATION TO SERVE AS YOUR RECEIPT OR A HOMESTEAD CALL BACK FORM REQUESTING ADDITIONAL INFORMATION. PLEASE RETURN THE REQUESTED INFORMATION IMMEDIATELY, SO AS NOT TO DELAY THE GRANTING OF YOUR EXEMPTION.

ORIGINAL APPLICATION FOR AD VALOREM TAX EXEMPTION

Permanent Florida residency required as of January 1.

COUNTY OF MANATEE

TAX YEAR 2011

Property ID: _____ TYPE: New Change Additional

(PLEASE MARK EXEMPTIONS FOR WHICH YOU ARE APPLYING)

- | | | | | | |
|--------------------------|--------------------------|-------------------------|--------------------------|---|--|
| <input type="checkbox"/> | \$25,000 Homestead | 4 | <input type="checkbox"/> | Total & permanent disability - Quadriplegic | |
| 1 | <input type="checkbox"/> | \$500 Widows / Widowers | 5 | <input type="checkbox"/> | Total & permanent disability |
| 2 | <input type="checkbox"/> | \$500 Blind | 6A | <input type="checkbox"/> | Service connected total & permanent disability |
| 3 | <input type="checkbox"/> | \$500 Disability | 6B | <input type="checkbox"/> | \$5,000 Veterans disability |

SEE REVERSE SIDE FOR REQUIRED DOCUMENTATION FOR ITEMS (1-6B) ABOVE.

***NOTE:** Disclosure of your social security number is mandatory. It is required by section 196.011(1), Florida Statutes. The social security number will be used to verify taxpayer identity information, homestead exemption information submitted to property appraisers, and intangible tax information submitted to the Department of Revenue.

Proof of residence for all owners	(1)	(2)
Applicant/Owner (Use additional forms as needed.)		
Mailing address		
Phone number		
Social security number *		
Marital status		
Date of birth		
Date you most recently became a permanent Florida resident		
Date of occupancy (move in date)		
Florida drivers license or Florida ID number		
Issue date (attach copy)		
Florida vehicle tag number or Manatee County voters registration number (attach copy)		
Are you a United States citizen?	Yes No	Yes No
If No, Resident Alien Card number (attach copy)		
Current employer		
Current employer's phone number		
Address listed on last Federal Income Tax return		
Address of previous residence (number, city & state)		
Did you receive Homestead or other benefits anywhere last year?	Yes No	Yes No
If yes, county & state		

NOTE: I hereby authorize this agency to obtain information, from utility companies or all other sources, to determine my eligibility for the exemption(s) applied for.

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 have the legal title or beneficial title in equity 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 the facts in it are true.

Signature/Date

Signature/Date

PLEASE MAKE SURE THAT ALL LINES HAVE BEEN COMPLETED AND NECESSARY COPIES ATTACHED BEFORE MAILING.

This application must be filed with the property appraiser on or before March 1st.

The information contained in this application will be provided to the Department of Revenue and may also be provided to any state in which the applicant has previously resided. Social security numbers will remain confidential pursuant to sections 193.114(6) and 193.074, Florida Statutes.

NOTICE: A tax lien can be imposed on your property pursuant to 196.161, Florida Statutes. Section 196.161 (1) provides: (1) (a) When the estate of any person is being probated or administered in another state under an allegation that such person was a resident of that state and the estate of such person contains real property situate in this state upon which homestead exemption has been allowed pursuant to s. 196.031 for any year or years within 10 years immediately prior to the death of the deceased, then within 3 years after the death of such a person the property appraiser of the county where the real property is located shall, upon knowledge of such fact, record a notice of tax lien against the property among the public records of that county, and the property shall be subject to the payment of all taxes exempt thereunder, a penalty of 50 percent of the unpaid taxes for each year, plus 15 percent interest per year, unless the circuit court having jurisdiction over the ancillary administration in this state, determines that the decedent was a permanent resident of this state during the year or years an exemption was allowed, whereupon the lien shall not be filed or, if filed, shall be canceled of record by the property appraiser of the county where the real estate is located. (b) In addition, upon determination by the property appraiser that for any year or years within the prior 10 years a person who was not entitled to a homestead exemption was granted a homestead exemption from ad valorem taxes, it shall be the duty of the property appraiser making such determination to serve upon the owner a notice of intent to record in the public records of the county a notice of tax lien against any property owned by that person in the county, and such property shall be identified in the notice of tax lien. Such property which is situated in this state shall be subject to the taxes exempted thereby, plus a penalty of 50 percent of the unpaid taxes for each year and 15 percent interest per annum. However, if a homestead exemption is improperly granted as a result of a clerical mistake or omission by the property appraiser, the person improperly receiving the exemption shall not be assessed penalty and interest. Before any such lien may be filed, the owner so notified must be given 30 days to pay the taxes, penalties, and interest.

PLEASE ANSWER THE FOLLOWING QUESTIONS:

If your answer to any of the questions below is yes, please note the documentation required to apply for the exemption as well as the benefit of the exemption.

1. YES NO Are you a widow/widower? (Not divorced prior to the death or remarried subsequent to the death of your spouse.)
If yes, reduces property taxable value by \$500.
Documentation required: Copy of death certificate.
2. YES NO Have you been declared legally blind?
If yes, reduces property taxable value by \$500
Documentation required: Certificate from blind services, Veteran's Administration, or Florida physician's certification (Form #DR416*) from one doctor for a partial exemption.
If you are legally blind and disabled, and have a low income you may be totally tax exempt if you qualify. See #5 for documentation required.
3. YES NO Have you been declared totally and permanently disabled not confined to a wheelchair?
If yes, reduces property taxable value by \$500.
Documentation required: Florida physician's certification (Form #DR416*) from one doctor.
4. YES NO Are you a quadriplegic?
If yes, you would pay no taxes except special assessments.
Documentation required: A Florida physician's certification (Form #DR416*) from two doctors.
5. YES NO Have you been declared totally and permanently disabled, have a low income, and are legally blind or confined to a wheelchair?
If yes, you would pay no taxes except special assessments.
Documentation required: Florida physician's certification (Form #DR416*) from two doctors not in same practice and an income statement (Form #DR501A*) for all members of the household.
6. YES NO Has the veteran's administration declared you disabled due to a service connected injury?
A. Total and permanent disability. If yes, you would pay no taxes except special assessments.
B. Partial disability (10% - 100%). If yes, reduces property taxable value by \$5,000.
Documentation required: A letter from the Veteran's Administration (VA form 27-333) stating effective date and service connected disability.

*Form available on Property Appraiser's website at www.manateepao.com or by calling 941.748.8208.