

ELLIS APPRAISAL DISTRICT
PO BOX 878
400 FERRIS AVE.
WAXAHACHIE, TX 75168
E-mail: ecad@elliscad.com

Property ID: _____

Phone: 972-937-3552
Fax: 972-937-1618

Granted: _____ Date: ____/____/____
Denied: _____ Date: ____/____/____

APPLICATION FOR RESIDENCE HOMESTEAD EXEMPTION

GENERAL INFORMATION: Property owners applying for a residence homestead exemption file this form and supporting documentation with the appraisal district in each county in which the property is located (Tax Code Sections 11.13, 11.131, 11.132, 11.133, 11.134 and 11.432). The exemptions apply only to property that you own and occupy as your principal place of residence. **Do not file this form with the Texas Comptroller of Public Accounts.** Application deadlines, required documents, information on heir property and manufactured housing, additional information and duty to notify are located after Step 7. **Please file ALL required documentation with this application.** For email delivery, please send to ecad@elliscad.com.

STEP 1: Exemption Eligibility

Do you own and live in the property for which you are seeking a residence homestead exemption?..... Yes No

____/____/____ ____/____/____

Date you acquired this property Date you began occupying this property (as your principal residence)

Are you filing a late application? Yes No Tax Year(s) for Application _____

A late application for residence homestead exemption filed for a disabled veteran (not a surviving spouse) under Tax Code sections 11.131 or 11.132 may be filed up to 5 years after the delinquency date. Surviving spouse of a disabled veteran, who files under Tax Code sections 11.131 or 11.132, may file up to two years after the delinquency date, for a late application for residence homestead exemption

Were you receiving a Homestead Exemption on your Previous Residence? Yes No

Are you transferring an exemption [11.131(d)-100% Disabled Vet, 11.132(d)-Donated Residence HS of Partially Disabled Vet, 11.133(c)-Member of Armed Forces Killed in Action, 11.134(d)-First Responder Killed in Line of Duty] as defined in Tax Code sections mentioned from a previous residence? Yes No

Are you transferring an Over 65/Disabled [Tax Code Section 11.26(h) or 11.261(h)] tax limitation (ceiling)? Yes No

Previous Residence Address, City, State, Zip Code

Previous County

Cooperative Housing: Do you have an exclusive right to occupy property because you own stock in a cooperative housing corporation? Yes No

If yes, state the name of cooperative housing corporation: _____

STEP 2: Applicant(s) Information (List only owners who own/occupy property and ownership interest. Provide information for other applicants in Section 7.)

1 _____ Married Couple
Name of Property Owner Birth Date*(mm/dd/yyyy) Driver's License, Personal ID Cert, SSN** Single Adult _____ % Ownership Interest
Other _____ % Ownership Interest

Primary Phone Number: ____-____-____ Email Address***

2 _____ Married Couple
Name of Property Owner Birth Date*(mm/dd/yyyy) Driver's License, Personal ID Cert, SSN** Single Adult _____ % Ownership Interest
Other _____ % Ownership Interest

Primary Phone Number: ____-____-____ Email Address***

Applicant's mailing address (if different from the physical address of this principal residence)

STEP 3: Property Information

Is the property for which this application is submitted an heir property (see Heir Property after Step 7)? Yes No

Do other heir property owners occupy the property? Yes (affidavits required (see Form 50-114-A)) No

Is any portion of the property for which you are claiming a residence homestead exemption income producing? Yes No

If yes, please indicate the percentage of the property that is income producing: _____%

Provide the physical address of the property you own and occupy as your principal residence and for which you are claiming a residence homestead exemption:

Physical Address (i.e. street address, not P.O. Box), City, County, ZIP Code

Legal Description (if known)

Appraisal District Property ID (if known)

Is this applicant identified on deed or other recorded instrument? Yes Court record/filing number on recorded deed or instrument _____
No If no, required documentation must be provided. (see Form 50-114-A at website listed above)

Number of acres (or fraction of an acre, not to exceed 20 acres) you own and occupy as your principal residence: _____ acres

If your principal residence is a manufactured home, provide the make, model and identification number:

Make

Model

ID Number

STEP 4: Types of Residence Homestead Exemptions Requested (Select all that you believe you are eligible to receive.)

Place an "x" or check mark beside each type of residence homestead exemption(s) you are applying for on the property described above in Step 2. A brief description of the qualifications for each type of exemption is provided beside the exemption name. For complete details regarding each type of exemption and its specific qualifications, you should consult Tax Code Chapter 11 Section(s) listed below. For a listing of homestead exemptions offered by your local taxing units, please visit www.ellis cad.com and see General Info/Entity Info/Entity Tax Rates and Exemption Information.

- ☐ **GENERAL RESIDENCE HOMESTEAD EXEMPTION** (Tax Code Section 11.13(a) and (b)): A property owner who acquires property after Jan. 1 may receive the residence homestead exemption for the applicable portion of that tax year immediately on qualification of the exemption, if the previous owner did not receive the same exemption for the tax year. The property owner must occupy the property as the owner's primary residence and the residence homestead exemption cannot 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 (or Surviving Spouse see Surviving Spouses below for Name & Date Information)** [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. [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% DISABLED VETERANS EXEMPTION (or Surviving Spouse see Surviving Spouses below for Name & Date Information)** [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 unemployability from the U.S. Department of Veterans Affairs or its successor. [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. **Documentation must be provided to support this exemption request.**
- 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
- ☐ **DONATED RESIDENCE HOMESTEAD OF PARTIALLY DISABLED VETERAN (or Surviving Spouse see Surviving Spouses below for Name & Date Information)** [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. [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.
- Documentation must be provided to support this exemption request **Percent Disability Rating**
- ☐ **Surviving Spouse of an Armed Services Member Killed or Fatally Injured in the Line of Duty** [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.

SURVIVING SPOUSES: If you indicated eligibility for one of the surviving spouse exemptions above, please provide the following information regarding your deceased spouse and attach all documents to support your request.

Name of Deceased Spouse

Date of Death

STEP 5: Waiver of Required Documents

Indicate if you are exempt from the requirement to provide a copy of your driver's license or state-issued personal identification certificate:

- ☐ I am a resident of a facility that provides services related to health, infirmity, or aging.

Name and Address of Facility

- ☐ I am certified for participation in the address confidentiality program administered by the Office of the Texas Attorney General under Code of Criminal Procedure Chapter 58, Subchapter B.

Indicate if you request that the chief appraiser waive the requirement that the property address for exemption corresponds to your driver's license or state-issued personal identification certificate address:

- ☐ I am an active duty U.S. armed services member or the spouse of an active duty member.
- ☐ I hold a driver's license issued under Transportation Code Section 521.121(c) or 521.1211. Attached is a copy of the application for that license.

STEP 6: Additional Information (if any)

If you own other residential property in Texas, please list the county(ies) in which they are located:

STEP 7: Affirmation and Signature(s)

I understand if I make a false statement on this form, I could be found guilty of a Class A misdemeanor or a state jail felony under Penal Code Section 37.10.

"I, _____, swear or affirm the following:
Printed Name of Property Owner(s) (Title or Authorization if not the owner)

- (1) 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/the property owner do(es) not claim an exemption on another residence homestead in Texas or claim a residence homestead exemption on a residence homestead outside Texas.

Sign • Please sign here (An exemption cannot be granted without a signed application.)

sign here Signature of Property Owner/Applicant 1 or Person Authorized to Sign the Application Date

Signature of Property Owner/Applicant 2 or Person Authorized to Sign the Application Date

REMEMBER to attach a copy of your driver's license or state-issued personal identification certificate. The address listed on your driver's license or state-issued personal identification certificate must correspond to the address of the property for which an exemption is claimed in this application.

(unless eligible for a waiver in Step 5)

*May be used by appraisal district to determine eligibility for persons age 65 or older exemption or surviving spouse exemptions (Tax Code §11.43(m))

** Social security number disclosure may be required for tax administration and identification. (42 U.S.C. §405(c)(2)(C)(i); Tax Code §11.43(f)). A driver's license number, personal identification number or social security number disclosed in an exemption application is confidential and not open to public inspection, except as authorized by Tax Code §11.48(b).

*** May be confidential under Government Code §552.137; however, by including the email address on this form, you are affirmatively consenting to its release under the Public Information Act.

FILING INSTRUCTIONS: File this form and all supporting documentation with the appraisal district office in each county in which the property is located generally between Jan. 1 and April 30 of the year for which the exemption is requested. **Do not file this document with the Texas Comptroller of Public Accounts.** A directory with contact information for appraisal district offices is on the Comptroller's website at <https://comptroller.texas.gov/taxes/property-tax/>

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 persons 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.
- If the chief appraiser grants the exemption(s), you do not need to reapply annually, but you must reapply if the chief appraiser requires it, unless seeking to apply the exemption to property not listed in this application.
- A late application for a residence homestead exemption may be filed up to two years after the deadline for filing has passed. (Tax Code § 11.431)
- 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 or in the information the Texas Department of Public Safety provided to the appraisal district under Transportation Code Section 521.049. (Tax Code Section 11.43(m))

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 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.

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

DUTY TO NOTIFY: Property owner must notify the chief appraiser in writing before May 1 of the year after your right to this exemption ends.

Property ID: _____