



ORIGINAL APPLICATION FOR HOMESTEAD AND RELATED TAX EXEMPTIONS

DR-501
R. 01/21
Rule 12D-16.002, F.A.C.
Page 1 of 4
Provisional

Permanent Florida residency required on January 1.
Application due to property appraiser by March 1.

County	Tax Year	Parcel ID
I am applying for homestead exemption, \$25,000 to \$50,000 <input type="checkbox"/> New <input type="checkbox"/> Change		
Do you claim residency in another county or state? Applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No Co-applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No		
	Applicant	Co-applicant/Spouse
Name		
*Social Security #		
Immigration #		
Date of birth		
% of ownership		
Date of permanent residency		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		
Homestead address		Mailing address, if different
Parcel identification number or legal description		Phone
Type of deed _____ Date of deed _____		
Recorded: Book _____ Page _____ Date _____ or Instrument Number		
Did any applicant receive or file for exemptions last year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Previous address: _____		
Please provide as much information as possible. Your county property appraiser will make the final determination.		
Proof of Residence	Applicant	Co-applicant/Spouse
Previous residency outside Florida and date terminated	date	date
FL driver license or ID card number	date	date
Evidence of relinquishing driver license from other state		
Florida vehicle tag number		
Florida voter registration number (if US citizen)	date	date
Declaration of domicile, enter date	date	date
Current employer		
Address on your last IRS return		
School location of dependent children	OFFICE USE ONLY MAY REQUEST AT A LATER DATE	OFFICE USE ONLY MAY REQUEST AT A LATER DATE
Bank statement and checking account mailing address	OFFICE USE ONLY MAY REQUEST AT A LATER DATE	OFFICE USE ONLY MAY REQUEST AT A LATER DATE
Proof of payment of utilities at homestead address	<input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY MAY REQUEST AT A LATER DATE	<input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY MAY REQUEST AT A LATER DATE
Name and address of any owners not residing on the property		

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

In addition to homestead exemption, I am applying for the following benefits. See page 3 for qualification and required documents.											
By local ordinance only:											
<input type="checkbox"/> Age 65 and older with limited income (amount determined by ordinance)											
<input type="checkbox"/> Age 65 and older with limited income and permanent residency for 25 years or more											
<input type="checkbox"/> \$500 widowed <input type="checkbox"/> \$500 blind <input type="checkbox"/> \$500 totally and permanently disabled											
<input type="checkbox"/> Total and permanent disability - quadriplegic											
<input type="checkbox"/> Certain total and permanent disabilities - limited income and hemiplegic, paraplegic, wheelchair required, or legally blind											
<input type="checkbox"/> Disabled veteran discount, 65 or older which carries over to the surviving spouse											
<input type="checkbox"/> Veteran disabled 10% or more											
<input type="checkbox"/> Disabled veteran confined to wheelchair, service-connected											
<input type="checkbox"/> Service-connected totally and permanently disabled veteran or surviving spouse											
If including proration of prior year tax on this parcel											
<input type="checkbox"/> I am a veteran or surviving spouse who received an exemption for service-connected totally and permanently disabled veteran or surviving spouse under section 196.081, F.S., on another property for the previous tax year in this county or, if another county, list the address, county and parcel number.											
<table border="1" style="width: 100%; border-collapse: collapse;"> <tr> <td style="width: 25%; padding: 2px;">Previous Address</td> <td style="width: 35%;"></td> <td style="width: 25%; padding: 2px;">Previous County</td> <td style="width: 15%;"></td> </tr> <tr> <td></td> <td></td> <td style="padding: 2px;">Previous Parcel Number</td> <td></td> </tr> </table>	Previous Address		Previous County				Previous Parcel Number				
Previous Address		Previous County									
		Previous Parcel Number									
<input type="checkbox"/> Surviving spouse of veteran who died while on active duty											
<input type="checkbox"/> First responder totally and permanently disabled in the line of duty or surviving spouse											
<input type="checkbox"/> Surviving spouse of first responder who died in the line of duty											
Other, specify: _____											

I authorize this agency to obtain information to determine my eligibility for the exemptions applied for. I qualify for these exemptions under Florida Statutes. I own the property above and it is my permanent residence or the permanent residence of my legal or natural dependent(s). (See s. 196.031, Florida Statutes.)

I understand that under section 196.131(2), F.S., any person who knowingly and willfully gives false information to claim homestead exemption is guilty of a misdemeanor of the first degree, punishable by imprisonment up to one year, a fine up to \$5,000, or both.

I have read, or have had someone read to me, the contents of this form.

I certify all information on this form and any attachments is true, correct, and in effect on January 1 of this year.

_____ Signature, applicant	_____ Date	_____ Signature, co-applicant	_____ Date
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Contact your local property appraiser if you have questions about your exemption.

File the signed application for exemption with the county property appraiser.

_____ Signature, property appraiser or deputy	_____ Date	_____ Entered by	_____ Date
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Penalties

The property appraiser has a duty to put a tax lien on your property if you received a homestead exemption during the past 10 years that you were not entitled to. The property appraiser will notify you that taxes with penalties and interest are due. You will have 30 days to pay before a lien is recorded. If this was not an error by the property appraiser, you will be subject to a penalty of 50 percent of the unpaid taxes and 15 percent interest each year (see s. 196.011(9)(a), F.S.). For special requirements for estates probated or administered outside Florida, see s. 196.161(1), F.S.

The information in this application will be given to the Department of Revenue. Under s. 196.121, F.S., the Department and property appraisers can give this information to any state where the applicant has resided. Social security numbers will remain confidential under s.193.114(5), F.S.

EXEMPTION AND DISCOUNT REQUIREMENTS

Homestead Every person who owns real property in Florida on January 1, makes the property his or her permanent residence or the permanent residence of a legal or natural dependent, and files an application may receive a property tax exemption up to \$50,000. The first \$25,000 applies to all property taxes. The added \$25,000 applies to assessed value over \$50,000 and only to non-school taxes.

Your local property appraiser will determine whether you are eligible. The appraiser may consider information such as the items requested on the bottom of page 1.

Save our Homes (SOH) Beginning the year after you receive homestead exemption, the assessment on your home cannot increase by more than the lesser of the change in the Consumer Price Index or 3 percent each year, no matter how much the just value increases. If you have moved from one Florida homestead to another within the last three years, you may be eligible to take some of your SOH savings with you. See your property appraiser for more information.

**This page does not contain all the requirements that determine your eligibility for an exemption.
Consult your local property appraiser and Chapter 196, Florida Statutes, for details.**

Added Benefits Available for Qualified Homestead Properties				
	Amount	Qualifications	Forms and Documents*	Statute
Exemptions				
Local option, age 65 and older	Determined by local ordinance	Local ordinance, limited income	Proof of age DR-501SC, household income	196.075
	The amount of the assessed value	Local ordinance, just value under \$250,000, permanent residency for 25 years or more.	DR-501SC, household income	
Widowed	\$500		Death certificate of spouse	196.202
Blind	\$500		Florida physician, DVA*, or SSA**	196.202
Totally and Permanently Disabled	\$500	Disabled	Florida physician, DVA*, or SSA**	196.202
	All taxes	Quadriplegic	2 Florida physicians or DVA*	196.101
	All taxes	Hemiplegic, paraplegic, wheelchair required for mobility, or legally blind Limited income	DR-416, DR-416B, or letters from 2 FL physicians (For the legally blind, one can be an optometrist.) Letter from DVA*, and DR-501A, household income	196.101
Veterans and First Responders Exemptions and Discount				
Disabled veteran discount, age 65 and older which carries over to the surviving spouse	% of disability	Combat-related disability	Proof of age, DR-501DV Proof of disability, DVA*, or US government	196.082
Veteran, disabled 10% or more by misfortune or during wartime service	Up to \$5,000	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.24
Veteran confined to wheelchair, service-connected, totally disabled	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.091
Service-connected, totally and permanently disabled veteran or surviving spouse	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.081
Surviving spouse of veteran who died while on active duty	All taxes	Surviving spouse	Letter attesting to the veteran's death while on active duty	196.081
First responder totally and permanently disabled in the line of duty or surviving spouse	All Taxes	First responder or surviving spouse	Proof of Disability, employer certificate, physician's certificate and SSA** (or additional physician certificate)	196.102
Surviving spouse of first responder who died in the line of duty	All taxes	Surviving spouse	Letter attesting to the first responder's death in the line of duty	196.081
*DVA is the US Department of Veterans Affairs or its predecessor. **SSA is the Social Security Administration.				

References

This form mentions the following documents, which are incorporated by reference in Rule 12D-16.002, F.A.C.
The forms may be available on your county property appraiser's website
or the Department of Revenue's website at <http://floridarevenue.com/property/Pages/Forms.aspx>.

<u>Form</u>	<u>Form Title</u>
DR-416	Physician's Certification of Total and Permanent Disability
DR-416B	Optometrist's Certification of Total and Permanent Disability
DR-501A	Statement of Gross Income
DR-501DV	Application and Return for Homestead Tax Discount, Veterans Age 65 and Older with a Combat-Related Disability and Surviving Spouse
DR-501SC	Adjusted Gross Household Income, Sworn Statement and Return



From the office of Jenny Fields, CFA
Martin County Property Appraiser

Florida Residency Affidavit

1. I do not, nor does my spouse (if married), claim a real property or ad valorem tax exemption for the tax year_____, in any other county, municipality or taxing district within the United States of America. Such exemptions include, but are not limited to, homestead or homeowner’s exemption, veteran’s exemption, disability exemption, seniors exemption, school tax relief, property tax rebate or refund, circuit breaker grant, property tax credit or percentage reduction.

- I am a Florida resident
- My spouse is a Florida resident
- My spouse is a resident of_____.

2. I do not, nor does my spouse (if married), receive any other type of benefit based on permanent residency such as payment of dividends or health benefits, in any other state, county, municipality or other taxing district within the United States of America.

3. I understand that Section 196.131(2), Florida Statutes, provides that any person who knowingly and willingly gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable as provided in Section 775.082, Florida Statutes, or by a fine not exceeding \$5,000 or both.

Affiant Signature

Affiant Signature

Print Name

Print Name

Date

Date

Website: pa.martin.fl.us

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11726 SE Federal Highway
Hobe Sound, FL 33455
(772) 546-1309

Stuart Main Office
3473 SE Willoughby Blvd. Suite 101
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