



2018 SENIOR VALUATION PROTECTION INFORMATION AND APPLICATION

Purpose: To Freeze application year **Limited Property Value** of a Primary Residence Owned by Seniors Based on Income and Age. For property located in Maricopa County only.

Application and supporting documentation deadline: September 1, 2018

Applicants qualifying by September 1st will be notified by December 1st of application year.

Applications after September 1st will be processed for the subsequent year.

Mail To: Maricopa County Assessor, 301 W. Jefferson, Phoenix, Arizona 85003 **Phone:** 602-506-3406.

*****Important Requirements for Applicant*****

- **Name must be on title of property and one owner a minimum of age 65 on or before September 1, 2018.**
- **Property must be applicant’s primary residence** for a **minimum of two** years on or before the September 1, 2018 deadline of application. Rental property does not qualify. An applicant can have only **one** primary residence. Any additions to this property may affect your frozen value.
- **All sources of income from all owners**, including **taxable and nontaxable** monies, cannot exceed \$36,000 for single owner or \$45,000 for two or more owners, in an average of income for the previous 3 years. (If an owner is deceased and still on the title, please send a copy of Death Certificate.) In the interest of safe-guarding your identity, please block out social security numbers and account numbers from all your documentation. You may black it out or white it out.

Income information will be used for verification only and is considered confidential

Copies of the following documents are required with application:

- Proof of age eligibility – Birth certificate, Passport or Driver’s License.
- Proof of **2 years residency**– Driver’s License, State Issued ID Card or Voter Registration, etc.
- Proof of **gross** income (**not** Adjusted Gross Income) – Income documentation for **previous 3 years**, which will include:

Federal income tax returns filed (2015, 2016, 2017) - copies of any federally filed tax returns: **1st** and **signed 2nd page** (please sign your 2nd page for us, if not signed), along with copies of any applicable **schedules C, D, E, and F.** IRS Tax Return Transcripts are acceptable. Make sure that social security income is listed on tax returns; if not, please include year end social security income statements (SSA-1099’s). Include nontaxable income award letters for income such as Veteran’s Benefits. Bank statements showing entries of direct deposits of Veteran’s Benefits or Workman’s Compensation are acceptable.

****Include documentation of any “rollovers” for IRA, pension, or annuity****

Federal income tax returns not filed (2015, 2016, 2017) - copies of year end income statements (1099’s), regarding all Interest, Dividends, Social Security, Retirement, Pension, Annuities, IRA, Wages, and Salaries. Please send award letters showing yearly income for Alimony, Disability, Veteran’s Benefits, Workman’s Compensation, Unemployment or Public Benefits. No bank statements or monthly statements (however, bank statements showing direct deposit entries of Veteran’s Benefits or Workman’s Compensation are acceptable).

****Include documentation of any “rollovers” for IRA, pension, or annuity****

Contacts for your income documentation
Social Security Administration 1-800-772-1213
Veteran’s Administration 1-800-827-1000
Internal Revenue Service 1-800-829-1040



Maricopa County Assessor
Paul D. Petersen

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Application Year: **2018** (Protection years **2019** through **2021**) Parcel Number _____ - _____ - _____
 Applicant Name: _____
 Co-Owners: _____
 Property Address: _____
 Mailing Address (If different from site): _____
 City/State/Zip: _____ Phone: (_____) _____
 Parcel ID of other parcels you own: _____

Please use the worksheet below to list yearly **gross income** (not Adjusted Gross Income) totals, including income that is not taxed. List income from **ALL sources** and from **ALL owners** for **past three years**. If you do not have income in a particular category, please list zero in that column. Please sign and mail your application as soon as possible. **The deadline for applications and supporting documents is September 1st**. The Assessor is required to respond to your application on or before December 1st. Per Arizona Constitution, Article 9, Section 18.7.

Income Type	2015 Year #1	2016 Year #2	2017 Year #3
Salaries, wages and tips earned	\$	\$	\$
Social Security benefits received (include Medicare)	\$	\$	\$
Pension, IRA, annuity income received	\$	\$	\$
Dividend and interest income received	\$	\$	\$
Rent and royalties received. (Schedule E)	\$	\$	\$
Capital Gains received. (Schedule D)	\$	\$	\$
Business and farm income received (Scheds C & F)	\$	\$	\$
Unemployment insurance payments received	\$	\$	\$
Workmen's compensation payments received	\$	\$	\$
Railroad and other retirement benefits received	\$	\$	\$
Veteran's benefits received	\$	\$	\$
Alimony payments received	\$	\$	\$
Estate and trust income received	\$	\$	\$
Welfare payments received	\$	\$	\$
Other income earned or received:	\$	\$	\$
Total:	\$	\$	\$

Attach to your application copies of supporting documentation (See information sheet for details):

- **Proof of Applicant's age, ownership, and residency**
- **Income statements, federal tax returns, and applicable schedules**

NOTE: The Assessor is required to review income qualifications for this program on a triennial basis and must use the average total income during the previous three years for renewals. Please make sure you maintain the necessary records for this review and use the 3-year, renewal worksheet that will be mailed to you 6 months prior to your renewal date.

For more information, please call 602-506-3406.

*Did owner(s) file federal tax return(s) for (please circle) **2015?** (Yes / No) **2016?** (Yes / No) **2017?** (Yes / No)
 Income from all gross taxable and non-taxable sources shall not exceed \$36,000 for one owner and combined income of \$45,000 for two or more owners in an income average of the past three years.*

Under penalty of perjury, I hereby state that all of the income information is complete and true and is an accurate listing of all taxable and non-taxable income of the applicant and all co-owners.

Signature

Date

Signature

Date