



# ORIGINAL APPLICATION FOR HOMESTEAD AND RELATED TAX EXEMPTIONS

LC-501  
REV-6/15  
PAGE 1

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

County	<b>LEE</b>	Tax Year	Parcel ID
I am applying for homestead exemption, \$25,000 to \$50,000 <input type="checkbox"/> New <input type="checkbox"/> Change <input type="checkbox"/> Addition			
Is any portion of the property leased or rented?		<input type="checkbox"/> Yes <input type="checkbox"/> No	% of Ownership
Homestead address		Mailing address, if different	
Legal description		Type of Deed _____	Date of Deed _____
		Instrument # _____	
	<b>Applicant</b>	<b>Co-applicant / Spouse</b>	
Name			
Date of permanent residency			
*Social Security #			
Immigration #			
Date of birth			
Marital Status (Single, Married, Divorced, Widowed)			
Spouse's name			
*Non-owner spouse SSN			
Do you claim residency in another state?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Did you receive or file for exemptions last year?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Previous Address			
Name and address of owners not residing on the property			
Are you applying for Portability?	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	

Please provide as much information as possible. The property appraiser will make the final determination.			
<b>Proof of Residence</b>	<b>Applicant</b>	<b>Co-applicant / Spouse</b>	
Previous residency outside Florida and date terminated	Date	Date	
FL driver license or ID card number	Date	Date	
Evidence of DL relinquishment from other state (if above is ID card)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	
Florida vehicle tag number			
Florida voter registration number (if US citizen)	Date	Date	
Declaration of domicile instrument #	Date	Date	
Current Employer			
Address on your last IRS return			
School location of dependent children			
Bank statement and checking account mailing address			
Proof of payment of utilities at homestead address	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No	

\* 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 additional benefits.** See page 3 for qualification and required documents.

By local ordinance only:

- Age 65 and older with limited income (amount determined by ordinance).
- Age 65 and older with limited income and permanent residency for 25 years or more.
- \$500 widowed       \$500 blind       \$500 totally and permanently disabled
- Total and permanent disability – quadriplegic
- Certain total and permanent disabilities - limited income and hemiplegic, paraplegic, wheelchair required, or legally blind
- Disabled veteran discount, 65 or older
- Veteran disabled 10% or more
- Disabled veteran confined to wheelchair, service-connected
- Service-connected totally and permanently disabled veteran or surviving spouse
- Surviving spouse of veteran who died while on active duty
- 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, F.S.)

I understand that under section 196.131(2), Florida Statutes, 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.

Under penalties of perjury, I declare that I have read the foregoing application and the facts in it are true.

\_\_\_\_\_  
Signature, applicant  
Date \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
Signature, co-applicant  
Date \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
Signature, property appraiser or deputy      Date \_\_\_\_\_

\_\_\_\_\_  
Entered by      Date \_\_\_\_\_

### 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% interest each year. See section 196.011(9)(a), F.S. For special requirements for estates probated or administered outside Florida. See section 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.

Contact your local property appraiser or  
Visit the Department of Revenue web site at <http://dor.myflorida.com/dor/property/>

## EXEMPTION AND DISCOUNT REQUIREMENTS

**Homestead** Every person who owns real property in Florida on January 1, makes the property his or her permanent residence, 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% each year, no matter how much the just value increases. If you have moved from one Florida homestead to another within the last two 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
<b>Exemptions</b>				
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
<b>Veteran's and First Responders Exemptions and Discount</b>				
Disabled veteran discount, age 65 and older	% 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 of at least 5 years	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
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
Department of Revenue (DR) forms are available at <a href="http://dor.myflorida.com/dor/property/forms/">http://dor.myflorida.com/dor/property/forms/</a> *DVA is the US Department of Veterans Affairs or its predecessor. **SSA is the Social Security Administration.				