# Montgomery County Senior Real Estate Property Tax Relief Program



**The application completed in its entirety and required documents are due by June 30th.**

**Date of Application:** ____/____/____

**Owner of Record**_____ *As recorded in the Recorder of Deeds' office.*

**Parcel Number**_____ *Can be found on real estate property tax bill and/or receipt.*

**Property address**_____

## APPLICANT INFORMATION

**Applicant Name(s)**_____ ; _____

**Date of Birth**_____ ; _____

**Ownership Type** ☐ **Individual/Joint** ☐ **Other Entity** *If Other Entity selected, attach trust agreement, operation agreement, etc.*

☐ **Yes** ☐ **No** **Were all applicants 62 or older during or before the application year?**

☐ **Yes** ☐ **No** **Does the applicant occupy the property as their primary residence?**

**Mailing Address**_____

**City**_____ **State**_____ **Zip Code**_____

**Phone Number**_____ **Cellular Number**_____

**E-mail Address**_____

## PROPERTY INFORMATION

☐ **Yes** ☐ **No** **Does the parcel include more than your Homestead?**
*A Homestead is the real estate property occupied by Eligible Taxpayer as their primary Residence.*

☐ **Yes** ☐ **No** **Does the parcel include more than one structure that serves as a dwelling unit?**

☐ **Yes** ☐ **No** **Have any improvements or additions been made to the property in the past year?**

☐ **Yes** ☐ **No** **Is the current homestead assessment under appeal?**

☐ **Yes** ☐ **No** **Are real property taxes on this property paid via escrow with your mortgage payment?**

☐ **Yes** ☐ **No** **Are the taxes on this property paid through the current tax year?**

## REQUIRED DOCUMENTS

*Please attach copies of the required documents to this application.*

☐ **Proof of Identity and Age**
*Include one of the following: Government-Issued Identification, such as, Driver's License, Birth Certificate, Passport, etc.*

☐ **Proof of Missouri Residency**
*Include one of the following: Driver's License, Voter Registration Card, state-issued nondriver identification, etc.*

☐ **Proof of Ownership**
***Deed Book***_____***Page***_____
***Or*** *include a copy of deed identifying Applicant as an owner of the Property, or a written instrument showing applicant has legal or equitable interest in the Property*

☐ **Proof of Liability for Payment of Taxes**
*Copy of the most recent full year paid property Tax receipt for the parcel.*

## CERTIFICATION

*Please read and initial the following statements:*

1. I have read the statements and questions included in this application and understand them and certify that all responses are true and accurate. _____ _____
2. I have the authority to act on behalf of the owners and occupants of the Property, and I or my spouse have not claimed more than one primary residence as a homestead for the purpose of a property tax credit in Missouri or elsewhere. _____ _____
3. I understand the County will rely on the information provided by the Applicant in this Application and this Certification is a material representation in evaluating this application for property tax credit. _____ _____

I specifically certify the following:

a. I am a resident of the State of Missouri.
b. I am the owner of record of the homestead for which I am seeking a property tax credit or have legal or equitable interest in such property by written instrument.
c. I am liable for the payment of real property taxes on such homestead.
d. I occupy the homestead as my primary residence for which I am seeking the Montgomery County Senior Real Estate Tax Relief credit.

**I understand I may be charged with a misdemeanor as stated in Section 575.050 and/or 575.060, RSMo if any information submitted in this application is found to be a false declaration and I am not aware of any information that would prohibit or disqualify me from receiving the tax credit for the homestead identified in this Application.**

Applicant Signature_____ Applicant Name (Printed)_____

Applicant Signature_____ Applicant Name (Printed)_____

## ELIGIBILITY VERIFICATION

### ASSESSOR

Initial Credit Year Assessed Valuation_____Book & Page of Primary Residence _____

Reduced value since initial credit year _____New Construction_____Taxing District Changes_____

Assessor Signature:_____

### Collector

Credit Amount _____ Credit Amount Noted on Tax Statement_____

Collector Signature:_____

### County Clerk

Registered Voter of Montgomery County_____

County Clerk Signature:_____

### Commission

Approved ☐ Yes ☐ No Reason_____

Presiding Commissioner Signature:_____

1st District Commissioner Signature:_____

2nd District Commissioner Signature:_____

Date:_____/_____/_____