



CLAUSE 17E

Requirements:

- A) ***Either***, a surviving spouse who owns and occupies the property as their residence. The applicant must have been a surviving spouse on or before July 1st,
- B) ***Or***, a person 70 years or over who has owned and occupied the property as their residence for at least 5 years. The applicant must have been 70 years old on or before July 1st,
- C) ***Or***, a minor child of a deceased parent.
- D) Whole estate (not including the value of your home unless it exceeds three dwelling units) cannot exceed: **\$73,107***

****This includes money in the bank, stocks, bonds, automobiles and any other real estate.***

Documentation Required:

Birth and/or death certificates, evidence of home ownership and occupancy and in-come tax.

Exemption Amount: \$369.31 (FY 23) (this amount changes annually)

CL. 17E GUIDELINES

DO NOT FILL OUT GUIDELINES THIS IS NOT THE APPLICATION; FILL OUT THE ATTACHED APPLICATION

Attached please find your Statutory Exemption CL. 17E. It is the intention of this office to process the applications immediately. Please fill out the application completely and answer every question. If the question does not apply, please write "none" in the space. The following is a guideline to assist you in filling out your application:

A. **IDENTIFICATION:** Information requested is standard information.

- Did you own the property on July 1, 2009?
- Was the property subject to a trust as of July 1, 2009?
(If a deed was recorded putting your property in a trust)

B. **EXEMPTION STATUS:**

- Check off Surviving Spouse if you are a surviving spouse
(First time filing attach a copy of the death certificate)
 - Fill out Deceased Spouse's Name
 - Fill out Deceased Spouse's Date of Death
 - Check off if you have remarried
If yes, date of remarriage
- If none of the above apply, fill in N/A – not applicable

MINOR WITH PARENT DECEASED:

Only applies to a minor child whose parents are deceased

PERSON OVER 70 YEARS OLD OR OLDER:

- Fill in date of Birth
(First time filing copy of birth certificate)
- Have you owned and occupied the property as your domicile for the last 10 yrs?
Check off yes or no
- If no, list other properties owned and occupied during the past 10 years.

C. **GROSS RECEIPTS FROM ALL SOURCES IN PRECEDING CALENDAR YEAR**

THIS SECTION NOT REQUIRED TO FILL OUT. PLEASE GO TO SECTION D

CL. 17E GUIDELINES

D. VALUE OF ALL PROPERTY OWNED ON JULY 1 THIS YEAR:

REAL ESTATE:

	Assessed Valuation	Amount Due on Mortgage	Value
Domicile	<u>Not Required</u>	<u>Not Required</u>	<u>Not Required</u>
All Other	Required	Required	Required

If you own any other property other than your domicile, you are required to fill out “All other” with the assessed value of the property. If this does not apply, write none.

PERSONAL ESTATE:

BANK ACCOUNTS:

The name and address of the bank must be filled out. The account number and balance in the bank accounts must be supplied. Any accounts you have must be filled out including checking, saving, credit unions, etc. If the account number or balance is not supplied, you will be sent a questionnaire. PLEASE NOTE: This application is not public information. This information does not leave this office.

Stocks, Bonds, Securities, Etc. – Description and amount must be supplied.
If it does not apply, write “None.”

Motor Vehicles and Trailers - Year, make and model of vehicle.
If it does not apply, write “None.”

Other Non-Exempt Personal Property – Any personal property that has a value.
(Does not include furniture.)
If it does not apply, write “None.”

E. SIGNATURE – The applicant must sign and date the application station all the information provided is correct.