



# HOUSEHOLD INCOME SWORN STATEMENT AND RETURN

Senior Citizen Exemption for Persons Age 65 and Over  
Section 196.075, Florida Statutes

DR-501SC  
R. 12/21  
Rule 12D-16.002, F.A.C.  
Provisional  
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Application year 20\_\_

This form is for use by property owners as a sworn statement of adjusted gross household income to qualify for the additional homestead exemption for property owners age 65 and older, with limited income.

When applying for the exemption for the first time, submit this completed statement, the *Original Application for Homestead and Related Tax Exemptions* (Form DR-501, incorporated by reference in Rule 12D-16.002, F.A.C.), and all required attachments with the county property appraiser on or before **March 1 of the current tax year**.

Applicant name	Address	
Phone		
<b>PART 1</b> List all persons living in the homestead on January 1 the year of exemption.		Do not include renters or boarders
Name of Household Member	Date of Birth	Filed IRS return? Yes No
		Adjusted Gross Household Income
		<input type="checkbox"/> <input type="checkbox"/>
		<input type="checkbox"/> <input type="checkbox"/>
		<input type="checkbox"/> <input type="checkbox"/>
		<input type="checkbox"/> <input type="checkbox"/>
Total adjusted gross household income for all household members		\$ 0.00

For each household member, submit the documents required by either **PART 2** or **PART 3** for last year's income. Contact your property appraiser's office for instructions.

<b>PART 2</b> For each member who files an IRS Form 1040 series (checked "Yes" in PART 1), submit:	
<ul style="list-style-type: none"> <li>IRS 1040 series form or an Application for Automatic Extension of Time to File U.S. Individual Income Tax Return (Form 4868), if applicable, and</li> <li>Wage and Tax Statements (W-2 Forms).</li> </ul>	
<b>PART 3</b> For each member who does not file an IRS Form 1040 series (checked "No" in PART 1), submit:	
<ul style="list-style-type: none"> <li>A copy of the prior year's Social Security Statement (SSA-1099), if applicable,</li> <li>An IRS Request for Transcript of Tax Return, IRS Form 4506-T. (Form 8821 or another form from the 4506 series can substitute), and</li> <li>A Statement of Income from page 3 of this form.</li> </ul>	
<b>PART 4</b> To establish you are age 65 or older on January 1 of the current tax year, submit one of the following:	
<ul style="list-style-type: none"> <li>Certified copy of a birth certificate,</li> <li>Florida Drivers License or Identification Card,</li> <li>Permanent Resident Card,</li> <li>Marriage certificate,</li> </ul>	<ul style="list-style-type: none"> <li>Certified school records,</li> <li>Certified census records, or</li> <li>Life insurance policy in effect longer than 2 years.</li> </ul>

CERTIFICATION

I certify that:

- I am at least 65 years old on January 1 of the tax year I am applying for. I have attached proof of my age.
- The total prior year adjusted gross household income of all persons living in the household on January 1 of the tax year is not more than the adjusted gross income under section 196.075, F.S. (\$20,000 adjusted annually starting in 2001 by percentage change in the average cost-of-living index.) The annual adjusted income limitation for persons 65 and older is available on the Department's website at [floridarevenue.com/property/Pages/DataPortal.aspx](http://floridarevenue.com/property/Pages/DataPortal.aspx).

I qualify for this exemption under Florida law. I am a permanent resident of the State of Florida and I own and occupy the property above. I understand that under s. 196.075(5), F.S., each year I must notify the property appraiser by May 1 if my household income exceeds the most recent income limitation. Under s. 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 a term of imprisonment up to 1 year or a fine up to \$5,000 or both.

Florida law requires property appraisers to determine whether an additional homestead exemption may be granted. Property appraisers will notify you if additional information or documentation is needed to determine eligibility for the additional homestead exemption requested. I grant permission to allow the property appraiser to review the supporting documents, if requested.

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

Under penalties of perjury, I declare that I have read the foregoing Household Income Sworn Statement and Return and the facts stated in it are true.

Signature	Print name	Date