

# City of Falls Church Relief Programs for Elderly and Disabled Residents

## Grant Year 2016 Certification INSTRUCTIONS

- Please carefully review the information that has been provided on your application.
- **Application deadline date is April 15, 2016.**

### Real Estate Relief

#### Eligibility

Income Limit for Households Eligible for Relief and Deferral: **\$22,850 and below** receives up to **\$4,000\***. The balance of any taxes owed may be deferred.

Income Limit for Households Eligible for Relief and Deferral: **\$22,851 to \$38,050** receives up to **\$3,000\***. The balance of any taxes owed may be deferred.

Income Limit for Households Eligible for Relief and Deferral: **\$38,051 to \$49,150** receives up to **\$1,000\***. The balance of any taxes owed may be deferred.

Gross combined household income limit: **\$49,151 - \$75,000** deferral only\*.

Applicants must be owner-occupants of the residential property in the City of Falls Church on December 31, 2015 and it must continue to be their primary residence in 2016.

Assets must not exceed \$540,000.

\* Based on a 1 person household. Income limits for 2 to 4 person households see attached chart.

#### Deferrals

Property owners with incomes between **\$49,151 and \$75,000** are not eligible for relief, but can elect to defer all of their taxes\*. (Deferral means you don't pay your real estate tax for the grant year).

Please indicate if you wish to defer. Remember deferred taxes, along with 3.50% interest this tax year, will be collected when your property is sold or there is a change of ownership.

\* Based on a 1 person household. Income limits for 2 to 4 person households see attached chart.

### Rent Relief

#### Eligibility

**Gross combined household income limit: \$38,250 and below.**

The landlord/owner must verify the yearly rent and sign the application.

Assets must not exceed \$150,000.

### Personal Property Tax and Automobile Decal Fee Relief

#### Eligibility

Gross combined household income limit: **\$20,000 and below.**

If the automobile for which the relief is sought is co-owned, all owners must be sixty-five (65) years of age or older, except the applicant's spouse need not have attained the age of sixty-five (65). Relief shall apply to only one vehicle per household. Leased vehicles are not eligible for relief.

The maximum grant for Personal Property Tax is \$25.00 and the maximum grant for Auto Decal Relief is \$33.00.

Assets must not exceed \$150,000.

For more information contact: Jeffrey Hill, Deputy Treasurer; [jhill@fallschurchva.gov](mailto:jhill@fallschurchva.gov)  
703-248-5047, TTY/Voice 711.

# 2016 Tax Relief Chart

<b>IF INCOME IS...</b>	<b>AND ASSETS ARE...</b>	<b>NUMBER OF PERSONS IN FAMILY IS...</b>	<b>AMOUNT OF RELIEF IS...</b>
\$0 - \$22,850	\$0 - \$540,000.00	1	\$4,000
\$0 - \$26,100	\$0 - \$540,000.00	2	\$4,000
\$0 - \$29,350	\$0 - \$540,000.00	3	\$4,000
\$0 - \$32,600	\$0 - \$540,000.00	4	\$4,000
\$22,851 - \$38,050	\$0 - \$540,000.00	1	\$3,000
\$26,101 - \$43,450	\$0 - \$540,000.00	2	\$3,000
\$29,351 - \$48,900	\$0 - \$540,000.00	3	\$3,000
\$32,601 - \$54,300	\$0 - \$540,000.00	4	\$3,000
\$38,051 - \$49,150	\$0 - \$540,000.00	1	\$1,000
\$43,451 - \$56,150	\$0 - \$540,000.00	2	\$1,000
\$48,901 - \$63,150	\$0 - \$540,000.00	3	\$1,000
\$54,301 - \$70,150	\$0 - \$540,000.00	4	\$1,000



## **APPLICATION FOR 2016 TAX RELIEF**

Please review all requested information carefully before you complete the application. **All information must be provided WITH documentation to support each entry.** If you file Federal and State Income Taxes, **you must include a complete copy of your 2015 Federal and State Income Tax Returns with your application.**

### **Persons with Disabilities**

If you or your spouse is applying for tax relief as "permanently and totally disabled," you must provide documentation certifying this. This must include: (1) documentation from the Social Security Administration, Department of Veterans Affairs or the Railroad Retirement Board; or (2) certifications from two physicians licensed in Virginia attesting that you are permanently and totally disabled.

### **Personal Property Tax Relief (automobiles)**

Information on the NADA trade-in value of your car can be obtained from the National Automobile Dealers Association's Official Used Car Guide, January 2016 Eastern Edition. Copies of the guide can be found in libraries, banks, and most credit unions.

Information furnished to the City of Falls Church Treasurer's Office will be maintained and disseminated for governmental purposes in accordance with the Virginia Freedom of Information Act, Code of Virginia, § 2.1.340 through 346.1 as amended, and the Privacy Protection Act of 1976, Code of Virginia §, 2.1.377 through 386, as amended.

### **Rent Relief (Cap on relief \$1,700)**

Income limit for eligible households: **\$38,250 and below**

Applicants must have paid rent for residential housing within the City of Falls Church during 2015. Special provisions apply for qualifying applicants residing in the City for less than the entire grant year. The total financial worth must not exceed **\$150,000** as of December 31, 2015.

### **APPLICATIONS ARE DUE BY APRIL 15, 2016**

**QUESTIONS?** CONTACT JEFF HILL, Chief Deputy Treasurer via email at *treasurer@fallschurchva.gov* or by phone at 703-248-5047 (TTY 711)

**All completed applications should be mailed or delivered in person to:**

**City of Falls Church Treasurer's Office  
300 Park Ave, Suite 103E  
Falls Church, VA 22046-3301**

**PLEASE COMPLETE SECTION A AND THE PARTS BELOW FOR  
THE TYPE OF RELIEF YOU ARE SEEKING**

**SECTION A: GENERAL INFORMATION**

Your Name: \_\_\_\_\_  
Last First Middle  
Your Birth Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Phone Number: \_\_\_\_\_  
Spouse's Name: \_\_\_\_\_  
Spouse's Birth Date: \_\_\_\_\_ Social Security Number: \_\_\_\_\_  
Do you file federal income tax? \_\_\_ Do you file state income tax? \_\_\_

**COMPLETE FOR REAL ESTATE TAX RELIEF**

Address: \_\_\_\_\_ Falls Church, VA  
RPC Number: \_\_\_\_\_ Date moved to current residence: \_\_\_\_\_  
(located on your assessment notice)

Is this your only dwelling or property? \_\_\_ Yes \_\_\_ No (**IF NO**, you must provide a copy of the current assessment with this application.)  
Name(s) of person(s) listed on the title to this residence (If the home titled by more than the primary tax relief applicant, then all income for all owners will be taken into account when calculating relief amounts. You will need all other titled owners to complete an application before April 15, 2016.)

*If the property is listed as a trust, or is in a trust please provide copy of executed document.*

**COMPLETE FOR RENT RELIEF ONLY**

Address: \_\_\_\_\_

**This area to be completed by the Resident Manager/Owner:**

Total Rent Paid in 2015: \_\_\_\_\_ Dated Moved to Above Residence: \_\_\_\_\_

List the name, relationship and social security number of all persons that occupy the applicant's apartment and/or are listed on the lease.

Name	Relationship	Social Security Number
1. _____	_____	_____
2. _____	_____	_____
3. _____	_____	_____

Signature of Resident Manager/Owner: \_\_\_\_\_

**COMPLETE FOR PERSONAL PROPERTY/AUTO DECAL RELIEF**

Address: \_\_\_\_\_

Name of Registered Owner(s): \_\_\_\_\_

City of Falls Church Property ID Number: \_\_\_\_\_ (from your personal property tax bill)

Vehicle Year \_\_\_\_\_ Make \_\_\_\_\_ Model \_\_\_\_\_

**FINANCIAL STATEMENT- JANUARY 1, 2015 - DECEMBER 31, 2015**

**\*\*\* DOCUMENTATION MUST BE FURNISHED \*\*\***

**Applications WILL NOT be processed without full and accurate documentation.**

<b>SECTION B. GROSS INCOME (MUST Include documentation)</b>					
	Applicant	Spouse	Relative 1	Relative 2	Relative 3
List all income for yourself, spouse, and any relative(s) living with you					
Salaries					
Bonuses and Commissions					
Interest and Dividends					
Gross Rental Income					
Pensions, Annuities					
Reverse Mortgage Income					
Alimony/Child Support					
Public Assistance					
Social Security*					
Other Income					
<b>TOTAL GROSS INCOME FOR EACH</b>					
Less 50% Social Security Permanent Disability Income or up to a maximum of \$7,500 from other disability income sources					
<b>ADJUSTED GROSS INCOME FOR EACH AFTER ALLOWABLE EXCLUSIONS</b> (*Do not include non-taxable Soc. Sec. Income in total)					
<b>COMBINED GROSS INCOME AFTER ALLOWABLE EXCLUSIONS \$ _____</b>					

\*Excluded from AGI.

<b>SECTION C. NET WORTH – ASSETS (MUST include documentation of assets)</b>					
	Applicant	Spouse	Relative 1	Relative 2	Relative 3
Cash on Hand in Bank and Savings					
Mortgages/Trust Notes Due to You					
Other Notes or Accounts Due You					
Stocks/Bonds/Certificates of Deposit					
Cash Value of Life Insurance					
Cash Value of Annuities					
Balance of Individual Retirement Accounts, 401K, etc.					
Real Estate Owned (other than residence for which relief is requested)					
Automobile Owned (est. Fair Market Value)					

**ADD TOTAL ASSETS FOR EACH TO ARRIVE AT COMBINED ASSETS \$ \_\_\_\_\_**

**SECTION D. NET WORTH – LIABILITIES**

	Applicant	Spouse	Relative 1	Relative 2	Relative 3
Notes Payable					
Accounts Payable (credit cards, personal loans, etc)					
Taxes Due - Federal					
Taxes Due - State and Other					
Other Debts					
Real Estate Mortgages					

**ADD TOTAL LIABILITIES FOR EACH TO ARRIVE AT COMBINED LIABILITIES.**

\$ \_\_\_\_\_

**SUBTRACT COMBINED LIABILITIES FROM COMBINED ASSETS TO ARRIVE AT NET WORTH.**

\$ \_\_\_\_\_

**FOR REAL ESTATE TAX RELIEF:**

If your income is between \$0 and \$47,600\* and your net worth does not exceed \$540,000, you are eligible for relief and may defer the balance of your taxes.

\*Based on a 1 person household. See attached chart for 2 – 4 person households.

**FOR REAL ESTATE TAX DEFERAL ONLY:**

If your income is between \$47,601 and \$75,000 and your net worth does not exceed \$540,000, you are not eligible for relief, BUT you may defer all of your taxes. Deferred taxes owed for 2016, along with applicable yearly interest, must be paid when the property is sold or transferred. The 2016 interest rate is 3.50%.

**Do you wish to defer all of the balance of your real estate taxes?**

\_\_\_\_ YES \_\_\_\_ NO

**Don't forget to attach a copy of supporting documentation  
of all income and assets with year-end statement as of 12/31/15.  
Your application WILL NOT be processed without it!**

**AFFIDAVIT**

I declare under the penalties provided by law that this Affidavit, Financial Statement and accompanying schedules have been examined by me and to the best of my knowledge and belief are true, correct and complete. **Any person or persons falsely claiming a grant or relief shall be guilty of a misdemeanor and will be prosecuted to the fullest extent of the law.**

Your Signature: \_\_\_\_\_ Date: \_\_\_\_\_

Spouse's Signature: \_\_\_\_\_ Date: \_\_\_\_\_

**Who may we contact with questions about your application?**

Name: \_\_\_\_\_ Relationship: \_\_\_\_\_

Phone: \_\_\_\_\_ Email: \_\_\_\_\_

**MAIL APPLICATION TO:**

City of Falls Church Treasurer's Office  
300 Park Avenue, Suite 103E  
Falls Church, Virginia 22046-3301

**APPLICATIONS ARE DUE BY APRIL 15, 2016**

***For Office Use Only:***

***Approved*** \_\_\_\_\_

***Amount:*** \_\_\_\_\_ ***Percent:*** \_\_\_\_\_ ***Date:*** \_\_\_\_\_

***Denied*** \_\_\_\_\_

***Reason:*** \_\_\_\_\_

Language interpretation services are available.

The Treasurer's Office and the City of Falls Church are committed to the letter and spirit of the Americans with Disabilities Act. This document will be made available in alternate format upon request. Call 703-248-5046 (TTY 711)