



Jefferson County  
Appraisal District  
FORM 11.13 (01/12)

**Application For Residential Homestead Exemption Tax Year \_\_\_\_\_**

**Account Number:** \_\_\_\_\_

Instructions to complete this form are on the back of the form. Return to Jefferson County Appraisal District, P.O. Box 21337, Beaumont, TX 77720-1337. The district is located at 4610 S Fourth St, Beaumont TX 77705. For questions, call (409) 840-9944 or 727-4611

<b>Step 1: Owner's name and Address (attach copy of sheets if needed)</b>	Owner's Name (person completing application)		Driver's License/State ID Number or SSN: _____
	Phone (area code and number)	Birth Date**	<b>REQUIRED: Attach copies of your Texas Driver's License/State-issued ID card *AND* your vehicle registration receipt. The physical address of your homestead must match the address on your Texas Driver's license/State-issued ID and your vehicle registration receipt. If you do not own a vehicle, see instructions on the back Step 1-E.</b>
	Date you first occupied the home:	Percent Ownership in property	
	Other Owner's Name(s), if any		

**Step 2: Describe your property**

Street address if different from above, or legal description if no street address (include property account number (if available)) \_\_\_\_\_

Number of acres (not to exceed 20) used for residential occupancy of the structure, if the land and structure have identical ownership: \_\_\_\_\_ acres

**MANUFACTURED HOMES** – In addition to this page, complete page 3.

**Step 3: Check exemptions that apply to you**

**GENERAL RESIDENCE EXEMPTION:** You qualify for this exemption if, (1) You owned this property on January 1; (2) You occupied it as your principal residence on January 1; **AND** (3) You or your spouse have not claimed a residence homestead exemption on any other property.

**DELETE EXEMPTION ON:** \_\_\_\_\_  
Street address, city & county \_\_\_\_\_ For year \_\_\_\_\_

**OVER-65 EXEMPTION:** You qualify for this exemption if you are 65 years of age or older. You cannot claim a disability exemption if you claim this exemption. More information about tax limitations or qualification dates, and documentation requirements may be found on back.  
Check if you will transfer a tax ceiling from your last home YES  NO   
Last Home Address \_\_\_\_\_

**DISABILITY EXEMPTION:** You qualify for this exemption if you are under a disability for the purposes of payment of disability benefits under the Federal Old Age, Survivor's and Disability Insurance Act OR you met the definition of disabled in that Act. You cannot claim an over-65 exemption if you claim this exemption. More information about tax limitations or qualification dates, and documentation requirements may be found on back. **PLEASE ATTACH DOCUMENTS VERIFYING YOUR DISABILITY.**  
Check if you will transfer a tax ceiling from your last home YES  NO   
Last Home Address \_\_\_\_\_

**100% DISABLED VETERANS EXEMPTION:** You qualify for this exemption if you are a disabled veteran who receives from the United State Department of Veterans Affairs (VA) or its successor (1) 100 percent disability compensation due to a service-connected disability; and (2) a rating of 100 percent disabled or a determination of individual unemployment from the VA. **Attach a current copy of your award letter or other document from the United States Department of Veterans Affairs.**

**EXTENSION OF EXEMPTION FOR A SURVIVING SPOUSE:** If you are a surviving spouse age 55 or older of a person who received or was qualified for the over-65 exemption, or if you are the surviving spouse of a 100% Disabled Veteran you may qualify for an extension of your spouse's exemption as well as the school tax ceiling. More information about tax limitations and qualifications may be found on the back.  
Check if you will transfer a tax ceiling from your last home. (Attach the tax ceiling certificate if transferring from another county.) YES  NO   
Last Home Address \_\_\_\_\_

Deceased Spouse's Name \_\_\_\_\_ Date of Death \_\_\_\_\_

PLEASE CALL OUR OFFICE REGARDING AVAILABLE EXEMPTIONS IF YOU ARE THE SURVIVING SPOUSE OF A PERSON WHO RECEIVED THE DISABILITY EXEMPTION

**Step 4: Answer if applies**

**COOPERATIVE HOUSING RESIDENTS:**  
Do you have an exclusive right to occupy this unit because you own stock in a cooperative housing corporation? YES  NO

**Step 5: Check if late**

**Application for homestead exemption for prior tax year \_\_\_\_\_**  
You must have met all of the qualifications checked above to receive the prior year exemption.

**Step 6: Sign and date the Application**

By signing this application, you state that you are qualified for the exemptions checked above and that the facts in this application are true and correct. You also state that you do not claim an exemption on another residence homestead. You must notify the Chief Appraiser if and when your right to the exemptions end. You swear or affirm that you have read and understand the penalty for filing a false statement.  
**If you make a false statement on this application, you could be found guilty of a Class A misdemeanor or a state jail felony under Texas Penal Code Section 37.10.**

Authorized Signature \_\_\_\_\_

Date \_\_\_\_\_

Printed Name \_\_\_\_\_

\*You are required to give us this information on this form in order to perform tax related function for this office. Tax Code Section 11.43 authorizes this office to request this information to determine tax compliance. The Chief Appraiser is required to keep the information confidential and not open to public inspection except to appraisal office employees who appraise property and as authorized by Section 11.48(b), Tax Code. \*\*Tax Code Section 11.43(m) allows a person who qualifies for a general homestead exemption to receive the 65 or older person exemption without applying when he/she becomes age 65 as shown on the application in the Appraisal District's records or in information available to the Appraisal District.

# Application for Residential Homestead Exemption

More Information:

## Tax Exemptions, Limitations, and Qualification Dates

**General Residence Homestead Exemptions:** You may only apply for residence homestead exemptions on one property in a tax year. A homestead exemption may include up to 20 acres of land that you actually use in the residential use (occupancy) of your home. Arbitrary factors that are unrelated to that use, such as acreage limits, matching legal descriptions, and contiguous parcels, may not be considered in determining if the land qualifies. To qualify for a homestead exemption, you must own and reside in your home on January 1 of the tax year. If you temporarily move away from your home, you still can qualify for an exemption if you do not establish another principal residence and you intend to return in a period of less than two (2) years. Homeowners in military service outside the US or in a facility providing services related to health, infirmity, or aging may exceed the two year period.

**Age 65 or Disability Exemptions:** You may receive an over-65 or disability homestead exemption immediately upon qualification for the exemptions. If you have not provided your birth date on this application, you must apply before the first anniversary of your qualification date to receive the exemption(s) in that tax year. For example, if you turn 65 or are disabled on June 1 of the current year, you have until May 31 of the next year to apply for the current tax year's over-65 or disability exemption(s). This special provision only applies to an over-65 or disability exemptions and not to other exemptions for which you may apply.

**Disability Exemptions:** You are entitled to the exemption if you meet the Social Security Administration's tests for disability. In simplest terms:

- 1) You must have a medically determinable physical or mental impairment;
- 2) The impairment must prevent you from engaging in **any** substantial gainful activity; and
- 3) The impairment must be expected to last for at least 12 continuous months or to result in death.

Alternatively, you will qualify if you are 55 or older and blind and cannot engage in your previous work because of your blindness.

To verify your eligibility, attach a copy of your disability determination letter from Social Security (or other recognized retirement system), or have your physician complete and mail us the JCAD form titled **Physician's Statement Verifying Eligibility for Disability Homestead Exemption**.

**Tax Limitations.** The over-65 or disability exemption for school taxes includes a school tax limitation, or ceiling. Other types of taxing units – County, city, or special districts – have the option to grant a tax limitation on homesteads of homeowners disabled or 65 years of age or older.

**100% Disabled Veterans:** Certain disabled veterans are eligible for 100% exemptions for their residence homesteads. Current documentation from the Department of Veterans Affairs (VA) must be submitted to prove that the veteran receives full VA compensation and is either rated as 100% disabled or has a determination of unemployability from the VA. If you qualify for this exemption after Jan. 1 of the tax year you may receive the exemption for the portion of the year for which you qualify.

**Surviving Spouse Extensions: Age 65 or older** You qualify for an extension of the exemption if (1) you are 55 years of age or older on the date your spouse died and (2) your deceased spouse was receiving either the over-65 exemption on this residence homestead or would have applied and qualified for the exemption in the year of the spouse's death. You will not receive the school tax limitation for the age 65 or older exemption unless your spouse died on or after December 1, 1987.

**Disabled-** You will not qualify for a disability exemption claimed by your deceased spouse. You are not entitled to continue the school tax limitation; however, you will be entitled to continue the local option County, city, or junior college limitation. **100% Disabled Veteran-** You qualify for an extension of this exemption if, at the time of the veteran's death, you were married and this property was your residence. If you re-marry, the exemption ends.

**Filing Deadlines:** File this application between January 1 and no later than April 30. You may file a late homestead exemption application if you file it no later than one year after the date taxes become delinquent. See the over-65 or disability section for more on late filing.

**Re-filing.** If the Chief Appraiser grants your exemption application, you do not need to reapply annually. You must reapply, however, if the Chief Appraiser requires you to do so by sending you a new application asking you to reapply. You must notify the Chief Appraiser in writing if and when your right to any exemption ends or your qualifications change. You must reapply if you qualify for additional exemptions based on age or disability in the future. If, however, your application information indicates that your age is 65 or older, or the Appraisal District has access to other information that proves you qualify, your need not re-file for the age 65 or older exemption. To ensure the earliest possible qualification without reapplication, the older spouse should complete the application for a married couple.

**Transfer of Tax Limitation or Ceiling:** Please call the Appraisal district if you will transfer a tax ceiling to your new home.

## INSTRUCTIONS: How to Complete the Application

Fill out the application completely. If you have trouble filling out this form, call the Appraisal District.

**Step 1: Owner's name and address.** Enter the following information:

- Print your NAME clearly under Owner's Name.
- Print your CURRENT MAILING ADDRESS and phone number.
- **Print your Texas Driver's license number, or Texas state-issued personal identification number in the box.**
- **IMPORTANT – Attach a copy of your Driver's License or state ID card. THIS IS REQUIRED**
- **IMPORTANT- Attach a copy of your vehicle registration receipt. THIS IS REQUIRED.**

Note: The address on your driver's license or state ID card and the address on your vehicle registration receipt **MUST** match the physical location of your residence. Copies of both documents are now **REQUIRED** for a homestead exemption.

- If you do not own a motor vehicle, you must complete the affidavit on Page 4, sign it before a Notary Public, and provide a copy of a utility bill for this property showing that it is in your name.
- Complete all information requested on the right side, Step 1

**Step 2: Describe the property.** Enter the information requested. Enter the number of acres used for residential purposes. **If you are applying for a residential homestead exemption for a manufactured home, you must complete page 3.**

**Step 3: Check exemptions that apply to you.**

Complete by checking the boxes that apply. If you check the disability exemption, attach documents verifying your disability. If a surviving spouse age 55 or older, enter all information requested. The Appraisal District may request documents on date of spouse's death.

**Step 4: Answer if applies.** If the property is cooperative housing, complete Step 4.

**Step 5: Check if late.** If you were eligible for an exemption last year, check the box in Step 5 for late filing and enter the prior tax year.

**Step 6: Sign and date the application.**

You must sign and date this application. Making false statements on your exemption application is a criminal offense.

**Step 7: Mail.** Mail to the Appraisal District where the property is located

If you would like to know the homestead exemptions offered by your taxing units, call our office at (409) 840-9944 or 727-4611 or visit our website at [www.jcad.org](http://www.jcad.org). Exemptions are listed under "Current Rates" in the Reports section.



Jefferson County  
Appraisal District  
P.O. Box 21337  
Beaumont, TX 77720-1337  
(409) 840-9944

# Information for a Residential Homestead Exemption for a Manufactured Home

Tax Year \_\_\_\_\_

Account Number: \_\_\_\_\_

**IMPORTANT: Please complete this information in addition to Steps 1-6 on Page 1**

Give the make, model and identification number of your home:

**Make:** \_\_\_\_\_

**Model:** \_\_\_\_\_

**Hud #:** \_\_\_\_\_

**Year:** \_\_\_\_\_

**Serial #:** \_\_\_\_\_

**Size:** \_\_\_\_\_

Attach a copy of the statement of ownership and location issued by the Texas Department of Housing and Community Affairs if home is 8' by 40' or larger, or attach a copy of the purchase contract or payment receipt showing you are the owner of the manufactured home. If your title information appears on the Texas Department of Housing and Community Affairs website, the appraisal district may use the website documents to verify your eligibility.

**If you are unable to establish ownership as outlined above, complete the affidavit below before a Notary Public.**

If it is determined that you own the manufactured home, you may also be eligible to receive the homestead exemption on the land on which it is located. Please answer the following questions.

1. Did you own the manufactured home January 1<sup>st</sup> of the year for which you are applying?      YES       NO
2. On January 1<sup>st</sup> did you own all or part of the land on which the manufactured home is located?      YES       NO
3. Did you occupy the manufactured home as your principal residence on January 1<sup>st</sup> of the year for which you are applying?      YES       NO

## AFFIDAVIT FOR MANUFACTURED HOME HOMESTEAD EXEMPTION

**State of Texas**

**County of** \_\_\_\_\_

Before me, the undersigned authority, personally appeared \_\_\_\_\_

who, being by me duly sworn, deposed as follows:

“My name is \_\_\_\_\_, I am over 18 years of age and I am otherwise fully competent to  
Print name

make this affidavit. I have personal knowledge of the facts contained herein and all of same are true and correct. I am the owner of the manufactured home identified above. The seller of the manufactured home did not provide me with a purchase contract, and I could not locate the seller after making a good faith effort.

Further, Affiant sayeth not”.

Signature of Affiant \_\_\_\_\_

**SUBSCRIBED AND SWORN TO** before me, this the

\_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

(seal)

\_\_\_\_\_  
 Notary Public in and for the State of Texas

My commission expires \_\_\_\_\_



Jefferson County  
 Appraisal District  
 P.O. Box 21337  
 Beaumont, TX 77720-1337  
 (409) 840-9944

# Affidavits

Tax Year \_\_\_\_\_

Account Number: \_\_\_\_\_

## AFFIDAVIT OF NON-OWNERSHIP OF MOTOR VEHICLE

State of Texas

County of \_\_\_\_\_

Before me, the undersigned authority, personally appeared \_\_\_\_\_

who, being by me duly sworn, deposed as follows:

“My name is \_\_\_\_\_, I am over 18 years of age and I am otherwise fully competent to  
Print name

make this affidavit. I have personal knowledge of the facts contained herein and all of same are true and correct.

I do not own a vehicle.

Further, Affiant sayeth not”.

Signature of Affiant \_\_\_\_\_

**SUBSCRIBED AND SWORN TO** before me, this the

\_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

(seal)

\_\_\_\_\_  
 Notary Public in and for the State of Texas

My commission expires \_\_\_\_\_

## AFFIDAVIT FOR OVER-65/DISABLED EXEMPTION

State of Texas

County of \_\_\_\_\_

Before me, the undersigned authority, personally appeared \_\_\_\_\_

who, being by me duly sworn, deposed as follows:

“My name is \_\_\_\_\_, I am over 18 years of age and I am otherwise fully competent to  
Print name

make this affidavit. I have personal knowledge of the facts contained herein and all of same are true and correct. I have a \_\_\_\_\_ percent ownership in the residence homestead identified in the foregoing exemption application.

Further, Affiant sayeth not”.

Signature of Affiant \_\_\_\_\_

**SUBSCRIBED AND SWORN TO** before me, this the

\_\_\_\_\_ day of \_\_\_\_\_, \_\_\_\_\_.

(seal)

\_\_\_\_\_  
 Notary Public in and for the State of Texas

My commission expires \_\_\_\_\_