

Instructions for Homestead Exemption Application DR-501 (12/14)

**Please Note: This application is 2 pages. Both pages must be submitted to make the application complete.**

Your application, once completed and signed, may be mailed, faxed or filed in person at one of our offices by **March 1**. Please refer to [Contact Us](#) on our website for addresses and telephone numbers.

**Florida Homestead Exemption official filing period is January 1 – March 1. Late-Filed applications are accepted up to the 25<sup>th</sup> day after the mailing of the Truth in Millage Notice (TRIM notice) in August.**

Use the sample as your guide.

Page 1:

1. Tax Year – Enter the eligible year you are seeking homestead exemption.
2. Parcel ID – Enter the 10 digit Folio Number or 22 digit PIN number [[property search](#)]
3. Check one: New is for a first time application. Addition is for adding an exemption or applicant to an established homestead exemption on record.
4. Check yes or no – if you have own a home in any other state or county that is receiving the homestead rebate, circuit breaker, or principle residence benefit.
5. Give us the name for any owner who is applying for the exemption and complete the following questions for each person:
  - a. Social Security Number (when the owner is married and the spouse is not listed as an owner, we are required to have the spouse's Social Security Number)
  - b. Immigration # - if you are not a US Citizen, birth or naturalized, include your 9 digit number (Axxx-xxx-xxx). Attach a copy of the Permanent Resident Card, both front and back.
  - c. Date of Birth
  - d. Date of Occupancy – the date you moved to or returned to the subject property after an absence.
6. Marital Status
7. Address of the home you are claiming as your primary residence (site address of the property which you are applying for homestead exemption)
8. Mailing address, if not the same as the primary residence address.
9. Telephone Number – give us a daytime number where we can reach you, if there are questions.
10. Did you have a tax exemption on another property during the preceding calendar year?
11. Where did you live on January 1 of the preceding calendar year?
12. Provide us the answer on the following questions for each applicant.
  - a. Driver License Number
  - b. Florida Voter Registration Number
  - c. Current Employer
  - d. Address on your last IRS return
  - e. School location for any dependent children
13. If there is an owner not residing at the subject property, provide us the address where they are living.

Page 2:

14. Indicate if there are other personal exemptions that you would like to include. Most require some documentation and proof, to qualify. Page 3 explains the qualifications. If you do not include the required documents, we will contact you with a request to provide the information. If you fail to comply you will be denied that exemption.

15. All applicants must sign and date the application and include a daytime telephone number. You may return the completed application (page 1-2) to any of our offices. Please refer to

**Contact Us** on our website for locations or you may mail to:

Hillsborough County Property Appraiser  
601 E Kennedy Blvd 15<sup>th</sup> Floor  
Tampa FL 33602



# ORIGINAL APPLICATION FOR HOMESTEAD AND RELATED TAX EXEMPTIONS

DR-501  
R. 12/14  
Rule 12D-16.002  
F.A.C.  
Eff. 12/14  
Provisional

Permanent Florida residency required on January 1.  
Application due to property appraiser by March 1.

County	Tax Year <b>1</b>	Parcel ID <b>2</b>
I am applying for homestead exemption, \$25,000 to \$50,000 <input type="checkbox"/> New <input type="checkbox"/> Change <b>3</b>		
Do you claim residency in another county or state?    Applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No    Co-applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>4</b>		
	<b>Applicant</b>	<b>Co-applicant/Spouse</b>
Name		
*Social Security #		
Immigration #		
Date of birth	<b>5</b>	
% of ownership		
Date of permanent residency		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <b>6</b>		
Homestead address <b>7</b>		Mailing address, if different <b>8</b>
Legal description		Phone <b>9</b>
Type of deed _____	Date of deed _____	Recorded:    Book _____ Page _____ Date _____
Did any applicant receive or file for exemptions last year? <input type="checkbox"/> Yes <input type="checkbox"/> No <b>10</b>		
Previous address: <b>11</b>		

Please provide as much information as possible. Your county property appraiser will make the final determination.

Proof of Residence	Applicant	Co-applicant/Spouse
Previous residency outside Florida and date terminated	date	date
FL driver license or ID card number	date	<b>12</b> date
Evidence of relinquishing driver license from other state		
Florida vehicle tag number		
Florida voter registration number (if US citizen)	date	date
Declaration of domicile, enter date	date	date
Current employer		
Address on your last IRS return		
School location of dependent children		
Bank statement and checking account mailing address		
Proof of payment of utilities at homestead address	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Name and address of any owners not residing on the property <b>13</b>		

\* Disclosure of your social security number is mandatory. It is required by section 196.011(1)(b), Florida Statutes. The social security number will be used to verify taxpayer identity and homestead exemption information submitted to property appraisers.

**In addition to homestead exemption, I am applying for the following additional benefits.**

See page 3 for qualification and required documents.

14

By local ordinance only:

- Age 65 and older with limited income (amount determined by ordinance)
- Age 65 and older with limited income and permanent residency for 25 years or more
- \$500 widowed     \$500 blind     \$500 totally and permanently disabled
- Total and permanent disability - quadriplegic
- Certain total and permanent disabilities - limited income and hemiplegic, paraplegic, wheelchair required, or legally blind
- Disabled veteran discount, 65 or older
- Veteran disabled 10% or more
- Disabled veteran confined to wheelchair, service-connected
- Service-connected totally and permanently disabled veteran or surviving spouse
- Surviving spouse of veteran who died while on active duty
- Surviving spouse of first responder who died in the line of duty

Other, specify: \_\_\_\_\_

I authorize this agency to obtain information to determine my eligibility for the exemptions applied for. I qualify for these exemptions under Florida Statutes. I am a permanent resident of the State of Florida and I own and occupy the property above.

I understand that under section 196.131(2), Florida Statutes, any person who knowingly and willfully gives false information to claim homestead exemption is guilty of a misdemeanor of the first degree, punishable by imprisonment up to 1 year, a fine up to \$5,000 or both.

Under penalties of perjury, I declare that I have read the foregoing application and the facts in it are true.

\_\_\_\_\_  
Signature, applicant

Date \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
Signature, Co-applicant

Date \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
Signature, property appraiser or deputy

Date \_\_\_\_\_

\_\_\_\_\_  
E Mail Address

Date \_\_\_\_\_

### Penalties

The property appraiser has a duty to put a tax lien on your property if you received a homestead exemption during the past 10 years that you were not entitled to. The property appraiser will notify you that taxes with penalties and interest are due. You will have 30 days to pay before a lien is recorded. If this was not an error by the property appraiser, you will be subject to a penalty of 50 percent of the unpaid taxes and 15% interest each year. See section 196.011(9)(a), F.S. For special requirements for estates probated or administered outside Florida. See section 196.161(1), F.S.

The information in this application will be given to the Department of Revenue. Under s. 196.121, F.S., the Department and property appraisers can give this information to any state where the applicant has resided. Social security numbers will remain confidential under s.193.114(5), F.S.

Contact your local property appraiser or  
Visit the Department of Revenue web site at <http://dor.myflorida.com/dor/property/>

## EXEMPTION AND DISCOUNT REQUIREMENTS

**Homestead** Every person who owns and resides on real property in Florida on January 1, makes the property his or her permanent residence, and files an application, may receive a property tax exemption up to \$50,000. The first \$25,000 applies to all property taxes. The added \$25,000 applies to assessed value over \$50,000 and only to non-school taxes.

Your local property appraiser will determine whether you are eligible. The appraiser may consider information such as the items requested on the bottom of page 1.

**Save our Homes (SOH)** Beginning the year after you receive homestead exemption, the assessment on your home cannot increase by more than the lesser of the change in the Consumer Price Index or 3% each year, no matter how much the just value increases. If you have moved from one Florida homestead to another within the last two years, you may be eligible to take some of your SOH savings with you. See your property appraiser for more information.

This page does not contain all the requirements that determine your eligibility for an exemption.  
Consult your local property appraiser and Chapter 196, Florida Statutes, for details.

Added Benefits Available for Qualified Homestead Properties				
	Amount	Qualifications	Forms and Documents*	Statute
<b>Exemptions</b>				
Local option, age 65 and older	Determined by local ordinance	Local ordinance, limited income	Proof of age DR-501SC, household income	196.075
	The amount of the assessed value	Local ordinance, just value under \$250,000, permanent residency for 25 years or more.	DR-501SC, household income, DR-501PR	
Widowed	\$500		Death certificate of spouse	196.202
Blind	\$500		Florida physician, DVA*, or SSA**	196.202
Totally and Permanently Disabled	\$500	Disabled	Florida physician, DVA*, or SSA**	196.202
	All taxes	Quadriplegic	2 Florida physicians or DVA*	196.101
	All taxes	Hemiplegic, paraplegic, wheelchair required for mobility, or legally blind Limited income	DR-416, DR-416B, or Letters from 2 FL physicians (For the legally blind, one can be an optometrist.) Letter from DVA*, and DR-501A, household income	196.101
<b>Veteran's and First Responders Exemptions and Discount</b>				
Disabled veteran discount, age 65 and older	% of disability	Combat-related disability	Proof of age, DR-501DV Proof of disability, DVA*, or US government	196.082
Veteran, disabled 10% or more by misfortune or during wartime service	Up to \$5,000	Veteran or surviving spouse of at least 5 years	Proof of disability, DVA*, or US government	196.24
Veteran confined to wheelchair, service-connected, totally disabled	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government	196.091
Service-connected, totally and permanently disabled veteran or surviving spouse	All taxes	Veteran or surviving spouse	Proof of disability, DVA*, or US government;	196.081
Surviving spouse of veteran who died while on active duty	All taxes	Surviving spouse	Letter attesting to the veteran's death while on active duty	196.081
Surviving spouse of first responder who died in the line of duty	All taxes	Surviving spouse	Letter attesting to the first responder's death in the line of duty	196.081
Department of Revenue (DR) forms are available at <a href="http://dor.myflorida.com/dor/property/forms/">http://dor.myflorida.com/dor/property/forms/</a> *DVA is the US Department of Veterans Affairs or its predecessor.**SSA is the Social Security Administration.				



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	<b>Applicant</b>	<b>Co-applicant/Spouse</b>
Name		
*Social Security #		
Immigration #		
Date of birth		
% of ownership		
Date of permanent residency		
Marital status <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed		
Homestead address		Mailing address, if different
Legal description		Phone
Type of deed _____	Date of deed _____	Recorded:    Book _____ Page _____ Date _____
Did any applicant receive or file for exemptions last year? <input type="checkbox"/> Yes <input type="checkbox"/> No		
Previous address:		

Please provide as much information as possible. Your county property appraiser will make the final determination.

Proof of Residence	Applicant	Co-applicant/Spouse
Previous residency outside Florida and date terminated	date	date
FL driver license or ID card number	date	date
Evidence of relinquishing driver license from other state		
Florida vehicle tag number		
Florida voter registration number (if US citizen)	date	date
Declaration of domicile, enter date	date	date
Current employer		
Address on your last IRS return		
School location of dependent children		
Bank statement and checking account mailing address		
Proof of payment of utilities at homestead address	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No
Name and address of any owners not residing on the property		

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\_\_\_\_\_  
Signature, applicant

Date \_\_\_\_\_ Phone \_\_\_\_\_

\_\_\_\_\_  
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Date \_\_\_\_\_ Phone \_\_\_\_\_

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