



COUNTY OF SURRY, VIRGINIA
JONATHAN F. JUDKINS
COMMISSIONER OF THE REVENUE

REAL ESTATE TAX RELIEF REQUIREMENTS

Through its Real Estate Tax Relief Ordinance for the Elderly, Surry County currently grants senior citizens (age 65 and older) and totally disabled citizens a tax relief on their house and lot if:

- a) The **total household annual income** received from **all** sources during the preceding calendar year of the owners of the dwelling who use it as their principal residence (and owners' relatives who live in the dwelling) **does not exceed \$55,000**.
- b) The **net worth** (excluding house and lot) of the owners (including the spouse of any owner) **does not exceed \$150,000**.

A dwelling jointly held by a husband and wife may qualify if either spouse is sixty-five or over or is permanently disabled. In addition, the first \$10,000 dollars of income of each relative (other than the spouse of the owner) who is living in the dwelling is not included in the total annual income qualification.

Proof of the following must be provided:

- A. Owners of the Dwelling
 - 1. Total Retirement Income
 - 2. Total Social Security Benefits Received
 - 3. Copy of the December Bank Statements (Checking and Savings)
 - 4. Cash Value of Certificates of Deposit
 - 5. Cash Value of Life Insurance
 - 6. Total Value of Stock and/or Bonds Owned
 - 7. Evidence of All Other Income Earned
 - 8. Proof of Disability (**if applicable**) - statement from Social Security, Department of Veterans Affairs, Railroad Retirement Board, or statements from two different doctors. This is required if the applicant is not **65** years of age.
- B. Each Relative of the Owner That is Living in the Dwelling
 - 1. Evidence of All Income Earned

ALL APPLICATIONS ARE DUE ANNUALLY ON OR BEFORE MAY 1st.