



THE CITY OF LYNCHBURG, VIRGINIA

APPLICATION FOR REAL ESTATE TAX RELIEF

Mitchell W. Nuckles  
Commissioner of the Revenue

Glenda W. Dix  
Deputy III

P.O. Box 858  
Lynchburg, VA 24505-0858  
Phone (434) 455-3884  
Fax (434) 847-1842

Name and mailing address as it appears on tax bill

For Office Use Only

Name \_\_\_\_\_

Tax Year \_\_\_\_\_  
Property Number \_\_\_\_\_

Mailing Address \_\_\_\_\_

Property Value \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip Code \_\_\_\_\_

Gross Income \$ \_\_\_\_\_

Email Address \_\_\_\_\_

Net Worth \$ \_\_\_\_\_

Property Owner \_\_\_\_\_  
Last Name First Middle

Birth Date \_\_\_\_\_ Social Security No. \_\_\_\_\_ Phone \_\_\_\_\_  
Mo. Day Yr.

Spouse \_\_\_\_\_  
Last Name First Middle

Birth Date \_\_\_\_\_ Social Security No. \_\_\_\_\_ Phone \_\_\_\_\_  
Mo. Day Yr.

Property Address if it is different from the mailing address above:

Street No. Street  
City State Zip Code

The information required on this application must be filled out in its entirety and returned to the Commissioner of the Revenue, P. O. Box 858, Lynchburg, Virginia 24505-0858. Applications must be filed by August 1, of the taxable year. Requested information that is not applicable should be completed as "Not Applicable" or "\$0.00" as indicated by the question. **This relief is granted on an annual basis and a new application must be filed each year.** All information on the application is confidential and not open to public inspection. For additional information, please call (434) 455-3884.

1. The person requesting relief must on July 1 of the taxable year, hold title or maintain life estate to the property for which relief is requested.

2. Is the applicant? Owner  Partial Owner  \_\_\_\_\_%

If partial ownership, explain how the ownership is legally held and the portion owned by the applicant.

3. Is this residence occupied by the applicant? Yes  No

4. List the name, relation, age and social security number of all persons related to the applicant who occupy the residence.

Name	Relation	Age	Social Security Number
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Please complete the gross income statement based on financial information from the preceding calendar year. Included in this statement should be the total gross income from all sources of the applicant, spouse, and all persons related to the applicant living in the residence.

GROSS INCOME	Applicant	Spouse	Relative(s) living in residence
Gross Earnings	\$	\$	\$
Pensions			
Social Security			
Interest			
Dividends			
Rent (Net)			
Welfare			
Gifts			
Capital Gains			
Other Sources			
Deduct, the first \$4,000 of income of each Relative Living in Residence			( - )
Total	\$	\$	\$

Total Combined Gross Income of the Applicant, Spouse and Relatives \$ \_\_\_\_\_

Please complete the statement of net financial worth based on financial information from the preceeding calendar year. Net financial worth shall exclude the fair market value of the dwelling and the land, not to exceed one acre, upon which the dwelling is situated.

NET VALUE OF ASSETS	Applicant	Spouse
Real Estate (other than home)		
Money in Certificates, Savings and others		
Checking Account(s)		
Stocks		
Bonds		
Insurance (Cash Value)		
Other Assets		
Total		

Total Combined Net Financial  
Worth of the Applicant and Spouse \$ \_\_\_\_\_

### AFFIDAVIT

I certify, under the penalties provided by law, that this application for Real Estate Tax Relief, including any accompanying schedules or statements, to the best of my knowledge and belief is true, correct and complete.

\_\_\_\_\_  
Date

\_\_\_\_\_  
Applicant's Signature

\_\_\_\_\_  
Date

\_\_\_\_\_  
Approved

# CITY OF LYNCHBURG, VIRGINIA

## Real Estate Tax Relief

1. The title of the property for which relief is requested is held, or partially held, on July 1 of the taxable year, by the person or persons requesting relief.
2. The applicant requesting relief must on July 1 of the taxable year, hold title, partially hold, or maintain life estate to the property for which relief is requested.
3. The head of the household occupying the dwelling and owning title, or partial title thereto, is sixty-five years or older or permanently and totally disabled on July 1 of the taxable year. Such dwelling must be occupied as the sole dwelling of the person requesting relief. If such person is permanently and totally disabled attach certification from the Social Security Administration. If such person is not eligible for Social Security, a sworn affidavit by two medical doctors to the effect that such person is permanently and totally disabled.
4. If gross combined income of the applicant(s) for the preceeding calendar year does not exceed \$32,500, the applicant may qualify. Gross combined income shall include income from all sources of the applicant, spouse, and relatives living in the dwelling for which relief is requested. The first \$4,000 of income of each relative other than the spouse is exempt.
5. The net combined financial worth of the applicant for the preceeding calendar year shall not exceed \$60,000. Net financial worth shall exclude the fair market value of the dwelling and the land, not to exceed one acre, upon which the dwelling is situated.
6. The person or persons to whom relief has been granted shall, on or before November 15, January 15, March 15, and May 15 of the tax year for which such relief was granted, present that portion of the tax which is due to the City Collector on or before the date prescribed for such tax payment. Payments not paid by such prescribed dates shall make the relief null and void.
7. Applicants must file annually by August 1, an application for real estate tax relief, with the Commissioner of the Revenue. Applications will be mailed to those who qualified the previous year, and others may obtain an application from the Commissioner of the Revenue office.

Commissioner of the Revenue  
P. O. Box 858  
Lynchburg, Virginia 24505-0858  
Telephone (434) 455-3884  
[www.lyncburgva.gov](http://www.lyncburgva.gov)

**NOTE:** Any person or persons falsely requesting relief shall be guilty of a misdemeanor and upon conviction thereof shall be punished as provided in Section 36-175 of the City Tax Code.