

# CITY OF ALPHARETTA

## SENIOR HOMESTEAD EXEMPTIONS

Several types of senior homestead exemptions have been enacted to reduce the burden of ad valorem taxation. To qualify property owners must own and occupy their home as primary residence as of January 1. Applications for homestead exemptions may be submitted any time during the year. However, in order to be eligible for the current tax year, property owners filing homestead applications must apply by April 1. Applications received after April 1 will be eligible to receive the exemption the following year. Property owners already receiving the exemption need not reapply unless there is a change in ownership, deed, or applying for an additional exemption. The City of Alpharetta offers the following senior homestead exemptions:

### SENIOR BASIC HOMESTEAD

A \$25,000 - Reduction to the assessed value of the property with improvements (home)

#### Eligibility Requirements:

- 65 years or older as of January 1 of the year for which the application is filed.
- Own, occupy and claim the property as your legal and primary residence on January 1 of the year in which you first qualify for the exemption.
- Individual(s) applying for the exemption must be listed on the deed.
- Current registration for all vehicles of owner and spouse. (Registration must show Alpharetta address.)
- Copy of Georgia Driver's License or GA ID (The address on the license/ID must match the address on application)

**SENIOR BASIC HOMESTEAD EXEMPTION WILL ROLL FORWARD FROM YEAR TO YEAR; HOWEVER, YOU MUST REAPPLY IF ANY CHANGES ARE MADE TO YOUR DEED.** You must notify the City if the listed owner(s) of the property changes.

### FULL VALUE HOMESTEAD EXEMPTION

A 100% Reduction to the assessed value of the property with improvements (home) to residents who meet certain income requirements.

#### Requirements:

- 70 years or older as of January 1 of the year for which the application is filed.
- Own, occupy and claim the property as your legal and primary residence on January 1 of the year in which you first qualify for the exemption.
- Individual(s) applying for the exemption must be listed on the deed.
- Adjusted Gross Income as defined by the Internal Revenue Code of the individual and spouse shall not exceed the maximum amount which may be received by an individual and spouse under the Social Security Act. For 2023, the maximum amount is \$87,048.
- Proof of age and income must be presented
  - Copy of Georgia Driver's License or GA ID (The address on the license/ID must match the address on application)
  - Current State and Federal Tax Returns
- Current registration for all vehicles of owner and spouse. (Registration must show Alpharetta address.)

**FULL VALUE HOMESTEAD EXEMPTION WILL ROLL FORWARD FROM YEAR TO YEAR. HOWEVER, YOU MUST REAPPLY IF ANY CHANGES ARE MADE TO YOUR DEED.** You are also required to notify the City if your income increases from the amount noted at the time of your original application. The City may contact you annually to verify your income information.

# CITY OF ALPHARETTA

## Senior Homestead Exemption Application Form

Applications for senior homestead exemptions may be submitted any time during the year. However, in order to be eligible for the current year, property owners filing homestead applications must apply by April 1 of each year. Applications received after April 1 will become eligible the following year. Property owners already receiving the exemption need not reapply.

<b>Effective Year of Application</b> _____
<b>Parcel ID#</b> _____
<b>Account#</b> _____

<b>Name of Claimant/Owner</b> _____	
<b>Property Address</b> _____	
<b>Mailing Address</b> _____ (if different from property address)	
<b>Age of Applicant</b> _____	<b>Birthdate</b> _____
<b>Age of Spouse</b> _____ (if applicable)	<b>Birthdate</b> _____
<b>Date of Acquisition</b> _____	
<b>Prior Owner</b> (if applicable) _____	<b>Email</b> _____

### B. Title Held:

- Sole owner  
One Owner
- Joint Tenants  
Ownership by two Persons
- Tenants in Common:  
Owners who each own half of an undivided estate
- Life Estate:  
Freehold estate giving a beneficiary all property rights except the right to sell.
- Other

**C. Mortgage Holder** \_\_\_\_\_  
\_\_\_\_\_

### D. Exemptions Applied For (Use attached description sheet) Please check the appropriate box:

- Age 65 or Older  
Skip page 3
- Age 70 or Older and has disclosed all income information as required and who meet certain income requirements as determined by the State of Georgia
- Page 3 required
- Regular Exemption \$25, 000
- Full Value Exemption

(All required documentation must be attached to the application to be considered for qualification.)

**CITY OF ALPHARETTA**

**Senior Homestead Exemption Income Summary**

Please complete this form if applying for Senior Full Homestead Exemption ONLY.

Customer's Name: \_\_\_\_\_  
Parcel Number: \_\_\_\_\_  
Account Number: \_\_\_\_\_

**1) List of all annual income (gross amounts) received by you and your spouse:**

Social Security \_\_\_\_\_  
Pension \_\_\_\_\_  
Retirement \_\_\_\_\_  
Railroad Pension \_\_\_\_\_  
VA Disability \_\_\_\_\_  
Other Pension, Retirement or Disability Income not listed above: \_\_\_\_\_

**2) List all other income (gross amounts) received by you and your spouse:**

Employment  
(ie: Wages, commissions, bonus and benefits) \_\_\_\_\_  
Interest Income \_\_\_\_\_  
Dividend Income \_\_\_\_\_  
Gain or Sale from Property \_\_\_\_\_  
Other Income not listed above:  
(ie: Business, rental, annuities, alimony and royalties) \_\_\_\_\_

**TOTAL ANNUAL INCOME:**

Total Add item 1 and 2 above: \_\_\_\_\_

**State and Federal Tax Returns must accompany application**

# CITY OF ALPHARETTA

## Senior Homestead Exemption Application

I, the undersigned claimant, do hereby state that the information given in support of this application is true and correct. I am the owner of said property and have occupied the residence at

\_\_\_\_\_ (street address)

\_\_\_\_\_

January 1, \_\_\_\_\_ (enter applicable tax year).

I have submitted all required legal proof of my age and disclosed all income information necessary to process this application. There has been no transaction made in collusion with another for the purpose of obtaining any tax exemptions contrary to law.

\_\_\_\_\_  
Claimant Signature

\_\_\_\_\_  
Telephone Number

\_\_\_\_\_  
Date

\_\_\_\_\_  
City of Alpharetta Approval

**Documentation Checklist:**

- Georgia Driver's License or GA ID
- Current registration for all vehicles of owner and spouse  
(Registration must show Alpharetta address)
- Current Federal and State Tax Returns (Senior Full Exemption Only)

Notices of approval or disapproval will be mailed to applicants in August or early September of the year for which you have applied.