



5555 Nicasio Valley Road, Nicasio, CA 94946
☎ 415.662.2184 / 📠 415.662.2250 / www.nicasioschool.org

Parcel Tax Senior Exemption Application Instructions

Dear Property Owner,

Attached is an application form for senior exemption from the Nicasio School District Parcel Tax charge. Please complete and sign this application and send it to our office, along with copies of the following required supplemental documents:

- ✓ **Proof of Your Birth Date** (i.e. copy of driver's license, state identification card, passport or birth certificate)

- ✓ **Proof of Residence**
If your identification lists an address OTHER THAN that for which you are requesting the exemption, you must submit a second document that details your name and the physical address of the property (i.e. utility bill such as PG&E, phone, garbage, etc., or a recent homeowner's insurance bill dated within the past six months).

- ✓ **Pages from Trust Instrument** (*for Beneficial Owners only*)
If ownership of your home is held under a trust instrument (TR) please submit copies of the following pages:
 1. First page;
 2. The page that names you as Beneficiary of the Trust or the page that states the trust is to be applied for your benefit;
 3. Signature page;
 4. Property description – The page within your trust (Exhibit/Schedule) that references the parcel number, lot number(s) for your property, or physical address of the property.

Please complete and return the senior exemption application along with the required supplemental documents on or before July 1, 2015, or before May 1 of any succeeding tax year either by fax: **(415) 662-2250**; email: **office@nicasioschool.org**; or mail to:

Nicasio School District
PO Box 711
Nicasio, CA 94946

If you have any questions, please contact the Nicasio School District Office at (415) 662-2184.

NICASIO SCHOOL DISTRICT

APPLICATION FOR PARCEL ASSESSMENT - SENIOR EXEMPTION

To be considered for senior exemption, the deadline for applying to Nicasio School District is on or before July 1, 2015, or before May 1 of any succeeding tax year.

To qualify for exemption for your parcel you must have turned age 65 on or before the application deadline, be an owner of record or a beneficial owner, and the property must be occupied as your primary residence. If you believe you qualify for this exemption, please complete and return this form, along with copies of all applicable documents (see enclosed senior exemption application instructions) either by fax: **(415) 662-2250**; email: **office@nicasioschool.org**; or mail to:

Nicasio School District, PO Box 711, Nicasio, CA 94946

Name (print): _____

Daytime Phone: _____ Email: _____

Parcel Address: _____

Mailing Address: _____

Date of Birth: _____ Property Parcel Number _____

PLEASE COMPLETE BOTH PART A and PART B:

PART A: **I am the owner of record**

- or -

I am a beneficial owner*

*A beneficial owner means that you have title in your name, or a trustee or other fiduciary who acts on your behalf may hold title for your benefit, such as a partner, a corporation, a lessor, obligee under a contract of sale, etc. Please provide a copy of the instrument or document under which you claim beneficial ownership. (See enclosed information letter for required pages.)

PART B: **The owner of record occupies this property as a primary residence**

Executed on _____, 20____, in _____, California.

I declare under the penalty of perjury the foregoing is true and correct.

Signature

If you have any questions or need assistance in completing this form, please call (415) 662-2184. The exemption shall remain in effect for each year the applicant remains eligible without need for annual re-application.

DISTRICT USE ONLY: Reviewed by: _____ Date of Approval: _____

Request Denied: Reason for Denial: _____