



**WIDOW/WIDOWER OR DISABLED EXEMPTION APPLICATION  
FINANCIAL STATEMENT  
Tax Year 2021**

Applicants for individual tax exemption must provide **ALL** household income for **2020**. Please answer the following questions.

1. Do you file an **ARIZONA STATE INCOME TAX RETURN?** YES \_\_\_ NO \_\_\_

If you answered **YES**, please **furnish** our office with a **Copy** of your **2020 ARIZONA STATE INCOME TAX RETURN.** (Adjusted Gross Income from Arizona Income Tax Form 140)

2. Is Social Security your only source of household Income? YES \_\_\_ NO \_\_\_

3. Do you or your spouse receive a pension of any kind? YES \_\_\_ NO \_\_\_

From Whom \_\_\_\_\_

Amount \$ \_\_\_\_\_ Monthly \_\_\_\_\_ Yearly \_\_\_\_\_

4. Do you or your spouse receive interest from any of the following? YES \_\_\_ NO \_\_\_

CHECKING AMOUNT PER YEAR \$ \_\_\_\_\_

SAVINGS AMOUNT PER YEAR \$ \_\_\_\_\_

CD'S AMOUNT PER YEAR \$ \_\_\_\_\_

INVESTMENTS AMOUNT PER YEAR \$ \_\_\_\_\_

5. Did you or your spouse receive any money from sale of property? YES \_\_\_ NO \_\_\_

Amount \$ \_\_\_\_\_ Monthly \_\_\_\_\_ Yearly \_\_\_\_\_

6. Do you or your spouse receive any other type of income not listed above? YES \_\_\_ NO \_\_\_

From Whom \_\_\_\_\_

Amount \$ \_\_\_\_\_ Monthly \_\_\_\_\_ Yearly \_\_\_\_\_

**PLEASE BRING THIS FINANCIAL FORM, A COPY OF YOUR 2020 AZ STATE INCOME TAX RETURN, THE AFFIDAVIT OF INDIVIDUAL TAX EXEMPTION, AND THE CERTIFICATE OF DISABILITY FOR PROPERTY TAX EXEMPTION (if filing as a totally and permanently disabled person) BY MARCH 1, 2021 TO 201 WEST FRONTIER ST, PAYSON OR 1400 EAST ASH STREET, GLOBE.**

IF YOU HAVE ANY QUESTIONS PLEASE CALL (928) 472-7973

**Signature:** \_\_\_\_\_ **Date:** \_\_\_\_\_

**Phone No.:** \_\_\_\_\_ **Email:** \_\_\_\_\_



## Joseph G. Williams - Gila County Assessor

### Individual Tax Exemption

### Frequently Asked Questions – Tax Year 2021

(A.R.S. 42-11111, 42-11151, 42-11152, 42-11153)

#### Who Is Entitled To an Individual Tax Exemption?

- Some Widows, Widowers, and Totally Disabled Persons who are age 18 or over.

#### What is the benefit of an Exemption?

- An exemption reduces the taxable LPV Assessed Value of one's property. This reduction may either lower the tax bill or eliminate it completely.
- If any exemption amount is left over after exempting the applicant's interest in properties owned, it may be applied to his/her motor vehicle.

#### What Are The Qualifications?

- 1) You must be a permanent Resident of Arizona.
- 2) Total Assessed Limited Property Value (LPV) of all Properties owned in Arizona **cannot exceed \$27,970**.
- 3) Taxable Household Income:
  - A. Total household income from all sources excluding Social Security, **cannot exceed \$34,301**.
  - B. If children under 18 years of age reside in the Household, total household income **cannot exceed \$41,151**.

#### What documents and proof are required when applying?

##### Disabled Persons:

In order to qualify for the disability exemption, a person must be **totally and permanently** disabled, either physically or mentally, resulting in that person's inability to engage in any substantial gainful activity and must submit one of the following:

- A. Certificate of Disability (DOR Form 82514B) signed by a physician or psychiatrist attesting that the person is totally and permanently disabled.
- B. A letter from the Department of Veterans Affairs stating the applicant is totally and permanent disabled.

##### Widows and Widowers:

The deceased Spouse must have been an Arizona resident at the time of death or Must have established residency in Arizona prior to January 1, 1969, if your spouse died as a resident of a state other than Arizona.

The Surviving Spouse must provide a Copy of the Recorded Death Certificate indicating he/she was married at the time of death. (Will not qualify if divorced or remarried).

##### Proof of Income:

You must provide a copy of your 2020 Arizona State Income Tax Return. If you do not file an income tax return, you must provide 2019 household income statements (W2s, pension, interest, social security, etc.)

#### If Qualified, How Does One Benefit?

- The "LPV Assessed Value" of your property may be reduced up to **\$4,117**.

#### Is the Exemption For My House Only? No.

- The Exemption is applied to Real Estate, then to a Manufactured Home or Mobile Home, and finally, to an Automobile.

#### Where do I Apply?

First time applicants must apply in person, with a form of Identification, at Gila County Assessor Office in Globe or Payson. Once you are approved, you will continue to receive the exemption unless one or more of the following applies: 1)Your household income is over the allowed limit, 2)Your LPV Assessed Value is over the allowed limit, 3)You have remarried (for widow/widower), or 4)You are no longer totally and permanently disabled (for disabled).

**Must apply between January 2 and March 1, 2021, at either Gila County Assessor offices.**

#### Globe Office:

Gila County Assessor's Office  
1400 East Ash Street  
Globe, Arizona 85501  
(928)-402-8711  
Toll Free: 1-800-304-4452

#### Payson Office:

Gila County Assessor's Office  
201 West Frontier Street  
Payson, AZ 85541  
(928) 472-7973