



**WIDOW/WIDOWER, DISABLED – VETERANS EXEMPTION APPLICATION
FINANCIAL STATEMENT
Tax Year 2024**

Applicants for individual tax exemption must provide **ALL** household income for **2023**. 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 **2023 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 the 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 2023 AZ STATE INCOME TAX RETURN, AFFIDAVIT OF INDIVIDUAL TAX EXEMPTION, AND CERTIFICATE OF DISABILITY FOR PROPERTY TAX EXEMPTION (if filing 100% permanently disabled person) OR VETERANS DISABILITY RATING LETTER BY MARCH 1, 2024, to 707 S. Colcord Rd, Suite 102, Payson OR 1400 E. Ash St, Globe.

IF YOU HAVE ANY QUESTIONS PLEASE CALL: (928) 472-7973 or (928) 402-8714

Signature: _____ **Date:** _____

Phone No.: _____ **Email:** _____



Joseph G. Williams - Gila County Assessor
Individual Tax Exemption
Frequently Asked Questions – Tax Year 2024
(A.R.S. 42-11111, 42-11151, 42-11152, 42-11153)

Who Is Entitled to an Individual Tax Exemption?

- If **qualified** Widows, Widowers, Totally Disabled Persons, and Disabled Veterans 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 \$30,099.**
- 3) Taxable Household Income:
 - A. Total household income with no children from all sources excluding Social Security, **cannot exceed \$37,297.**
 - B. If children under 18 years of age reside in the household, total household income **cannot exceed \$44,745.**

What documentation and proof of income are required when applying?

Disabled Persons:

To qualify for the disability exemption, a person must be 100% **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 disability rating.

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 2023 Arizona State Income Tax Return. If you do not file an income tax return, you must provide 2023 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 **\$4,476**.

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, 2024, at either Gila County Assessor offices.

Globe Office:

Gila County Assessor's Office
1400 E. Ash Street
Globe, AZ 85501
(928) 402-8714
Toll Free: 1-800-304-4452

Payson Office:

Gila County Assessor's Office
707 S. Colcord Rd, Ste. 102
Payson, AZ 85541
(928) 472-7973