



Eddie Cook  
Maricopa County Assessor

**2021 SENIOR VALUATION PROTECTION INFORMATION AND APPLICATION**

**Purpose:** To freeze application year Limited Property Value of a Primary Residence owned by seniors based on income, age and residency. For property located in Maricopa County only. It is important to note that this program **does not freeze your property TAXES, it freezes the taxable portion of your property VALUE.**

**Application and supporting documentation deadline:** September 1, 2021.

Applicants qualified by September 1<sup>st</sup> will be notified by December 1<sup>st</sup> of application year. Applications after September 1<sup>st</sup> will be processed for the following year.

**Mail To:** Maricopa County Assessor, Senior Valuation Protection, 301 W Jefferson St, Phoenix, Arizona 85003

**Phone:** 602-506-3406, by fax: 602-506-7620 or by email: [PE.SVP@maricopa.gov](mailto:PE.SVP@maricopa.gov)

**\*\*\*Important Requirements for Applicant\*\*\***

**Please black out your Social Security numbers and account numbers to protect your identity.**

**In order to prevent delays in processing your application, please ensure the following documentation is included with your application: (Please do not use staples, tape or glue)**

\_\_\_\_\_ 1. Applicant Proof of Age: **Minimum age of 65** for at least one owner on title.

- Driver's License *or*
- Birth Certificate *or*
- Passport

\_\_\_\_\_ 2. Applicant Proof of Primary Residence for 2 years (Note: This document must show your physical address *and* be at least 2 years old). Owner name must be on title of property.

- Driver's License *or*
- State Issued ID Card *or*
- Voter Registration

\_\_\_\_\_ 3. Documentation of ALL sources of Income, TAXABLE & NON-TAXABLE; for Owner & Co-Owners of the Property for 2018, 2019, & 2020. Income limits for the 2021 application year are \$38,112 for one owner, and \$47,640 for two or more property owners.

- Copies of your **SIGNED, AZ TAX RETURNS** or Federal 1040 tax returns *or*
- Social Security (Form SSA-1099 Statements)
- Interest / Dividends (Form 1099-R Statements)
- Wages / Salary / Tips (Form W2 Statements)
- Pension / Annuity / IRA / (Form 1099-R Statements; include any rollover documentation)
- Capital Gains / Rent & Royalties (Form 1099-B / 1099 Misc. Statements)
- Veteran's Benefits (Award Letter or bank statements reflecting deposit amount)
- Welfare Benefits (e.g., Alimony, Workman's Comp., etc.)

\_\_\_\_\_ 4. Applicant(s)' signatures on completed application.

**Contacts to obtain copies of your income documentation**

Social Security Administration 1-800-772-1213

Veteran's Administration 1-800-827-1000

Internal Revenue Service 1-800-906-9887 "Tax Return Transcripts" are required in lieu of Tax Returns.

*If qualified, owners must renew every 3 years. Renewal applications will be sent 6 months prior to the deadline of September 1st of renewal year.*



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**2021 SENIOR VALUATION PROTECTION INFORMATION AND APPLICATION**

Application Year: **2021** (Protection years **2022** through **2024**) Parcel Number: \_\_\_\_\_ - \_\_\_\_\_ - \_\_\_\_\_

Applicant Name: \_\_\_\_\_

Co-Owners: \_\_\_\_\_

Property Address: \_\_\_\_\_

City/State/Zip: \_\_\_\_\_

Mailing Address (If different from site): \_\_\_\_\_

Email: \_\_\_\_\_ Phone Number: \_\_\_\_\_

Parcel ID of other parcels you own: \_\_\_\_\_

Please use the worksheet below to list yearly **Adjusted Gross Income** totals. List income from **ALL** sources and from **ALL** owners for **past three years**. If you do not have income in a particular category, please list zero in that column. Please sign and mail your application as soon as possible. **The deadline for applications and supporting documents is September 1<sup>st</sup>**. The Assessor is required to respond to your application on or before December 1<sup>st</sup>. Per Arizona Constitution, Article 9, Section 18.7.

Income Type	2018 Year #1	2019 Year #2	2020 Year #3
Salaries, wages and tips earned	\$	\$	\$
Social Security benefits received (include Medicare)	\$	\$	\$
Pension, IRA, annuity income received	\$	\$	\$
Dividend and interest income received	\$	\$	\$
Rent and royalties received. (Schedule E)	\$	\$	\$
Capital Gains received. (Schedule D)	\$	\$	\$
Business and farm income received (Scheds C & F)	\$	\$	\$
Unemployment insurance payments received	\$	\$	\$
Workmen’s compensation payments received	\$	\$	\$
Railroad and other retirement benefits received	\$	\$	\$
Veteran’s benefits received	\$	\$	\$
Welfare payments received	\$	\$	\$
Other income earned or received:	\$	\$	\$
Total:	\$	\$	\$

**Provide copies of your supporting documents with your application (PEASE DO NOT USE STAPLES):**

- Proof of applicant’s age (65+) and 2-year residency.
- 1099 income statements and federal tax returns.

***NOTE: The Assessor is required to review income qualifications for this program on a triennial basis and must use the average total income during the previous three years for renewals. Please make sure you maintain the necessary records for this review and use the 3-year, renewal form that will be mailed to you 6 months prior to your renewal date. For more information, please call 602-506-3406.***

Did owner(s) file federal tax return(s) for (please circle) 2018? (Yes / No) 2019? (Yes / No) 2020? (Yes / No)

*Income from all gross taxable and non-taxable sources shall not exceed \$38,112 for one owner and combined income of \$47,640 for two or more owners in an income average of the past three years.*

***Under penalty of perjury, I hereby state that all of the income information is complete and true and is an accurate listing of all taxable and non-taxable income of the applicant and all co-owners.***

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Signature	Date	Signature	Date
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