

1st TIME APPLICATION: 2011-12 SENIOR EXEMPTION FROM MEASURE R PARCEL TAX

NOTE: *If you've previously received the Senior Exemption, a Renewal Form will automatically be sent to you each May, which must be returned by July 31st each year.*

Background: In the February 5, 2008 Special Election, voters approved by 73.03% the Measure R parcel tax (which replaced the previous Measures Y and S parcel taxes). Measure A includes a Senior Exemption, allowing senior citizens who qualify to be exempted from paying the tax. *(Please see other side for background information.)*

To qualify for the Senior Exemption from Parcel Tax, you must: 1) turn 65 years old by June 30th, 2011; 2) own and occupy your property as your primary residence; and, 3) annually apply for the exemption by July 31st each year. *A Renewal Form will be sent each May to confirm that you still own and occupy your property. Rental properties are not eligible, unless owner-occupied.*

1. Please complete items 1 through 4, below:

Name: _____ Phone # _____

Address: _____ DOB: _____

City/State/Zip: _____

ASSESSOR'S ID # (Parcel Number): _____

***CONTIGUOUS PARCELS ONLY:** If you own more than one parcel "contiguous" (touching) the main parcel, list below or attach a separate sheet. (You receive a separate tax bill for each parcel.)

2. Please sign the Penalty of Perjury clause below:

I certify that I own and occupy the above-listed property(ies) as my primary place of residence. I declare under penalty of perjury that this Application (including accompanying copies of proof documents) is, to the best of my knowledge, correct and complete.

Signature of Applicant

Date Signed

3. Please include Copies of Proofs:

- AGE** (Calif. Driver's License/California Identification Card or passport or birth certificate)
- PROPERTY OWNERSHIP** (Your current property tax bill)

4. Return Form to: SMMUSD / 1651 16th St. / Santa Monica, CA 90404-3891 / ATTN: DAWN

DEADLINE: JULY 31, 2011

****Please include a self-addressed, stamped envelope (SASE) if you would like a receipt****

This space reserved for Santa Monica-Malibu Unified School District only
Approved _____ Denied _____ School District Signature _____

**If you own multiple parcels within the District, you may only claim the Senior Exemption for the parcel that constitutes your primary place of residence and any Contiguous Parcels. "Contiguous Parcels" are any parcels that share a common lot line with the parcel on which an owner-occupied residence is located (each an "Immediately Adjacent Parcel"), and any parcel that shares a common lot line with any Immediately Adjacent Parcel.*

Revised 4/8/11

Measure R - Background Information

At the October 25, 2007 Board Meeting, the Santa Monica-Malibu Unified School District Board of Education approved Recommendation No. A.02: Accept Recommendation from the Parcel Tax Feasibility Committee and Adopt Resolution No. 07-09 – Renewal of Special Taxes to Be Placed on the February 5, 2008 Ballot for Voter Approval.

The Board established the Parcel Tax Renewal Feasibility Committee on August 9, 2007. The Committee was charged with bringing a recommendation to the Board on the feasibility of renewing one or both of the parcel tax Measures S and Y and which election date the renewal should be placed. The Board combined and renewed–without increasing–the existing parcel taxes known as Measure S and Y, equaling \$346 per parcel, and included a senior exemption and an annual CPI-U adjustment.

Summary Text of February 5, 2008 Ballot Measure:

SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT	
SPECIAL ELECTION	
To preserve quality schools despite inadequate state funding, and prevent program cuts, shall the Santa Monica-Malibu Unified School District renew–without increasing-existing school parcel taxes, annually adjusted for inflation, with exemptions for homes owned and occupied by senior citizens, and annual audits reported to taxpayers by Independent Citizens Oversight Committee? Funds used to retain highly qualified teachers and reduced class size, protect excellence in math, science, technology, arts, music, reading; sustain libraries. No funds used for administrator salaries.	
Measure R Passed: Yes: 73.03%	No: 26.97%

When the application is returned by the July 31st deadline, the Measure R parcel tax charge is removed before the property tax bill is printed and mailed to you in October.

REMINDERS:

- ❖ A renewal form will be sent each May, which must be completed, signed and returned by July 31st each year. If you don't receive the form by June, call Dawn at (310) 450-8338, ext. 70-263.
- ❖ Address labels are used to mail to over 3,000 addresses. Please do not mistake this mailing for "junk" mail, but open all mail from Santa Monica-Malibu Unified School District.
- ❖ Complete all blanks on the form and list your actual residence on the form. If you would like future forms to be mailed to a different address, please note that on the form.
- ❖ Please don't delay returning the form if you can't find your Assessor ID number; we have it.
- ❖ The senior citizen who provided proof of age must sign the form. Either spouse may sign if both are 65 and provide proof of age, which is encouraged if one spouse is away during this process.
- ❖ Deadline: July 31st, 2011 (and every July 31st in subsequent years).
- ❖ For a receipt: Please enclose a self-addressed, stamped envelope when you mail your form, or drop off the form in person at 1651 16th Street, Santa Monica, and ask for a receipt.
- ❖ When the form is received by the deadline, your Assessor ID number is given to the Assessor in early August. Their office deletes the Measure R parcel tax from your property tax bill, then prints and mails it to you in October – without the tax, usually listed as *SMMUSD (Meas R)* under the Direct Assessments portion of the bill.