

2017-18 TAX YEAR
SANTA MONICA-MALIBU UNIFIED SCHOOL DISTRICT
MEASURE "R" PARCEL TAX SENIOR EXEMPTION APPLICATION FORM FOR NEW APPLICANTS

Exemption Application Process: Persons seeking senior citizen exemption from payment of the parcel tax shall be granted an exemption upon satisfaction of the following requirements: 1) Age 65 by June 30th of the year the application is made; 2) Own and occupy the property as their principal place of residence; and, 3) Annually apply for the exemption by the application deadline of each year. **PLEASE NOTE: Rental and non-primary (vacation home and second home) properties are not eligible for senior citizen tax exemption. Although annual deadlines are typically June 30th each year, it is subject to change and it is the applicant's responsibility to confirm the due date. Furthermore, SMMUSD is not responsible for undelivered mail. Should a renewal application is not received by you, contact the Measure R Office at (310) 450-8338 ext. 70263 no later than May 1st in the year of exemption so arrangements can be made for your access to the forms.**

1. Senior Citizen Exemption Applicant Information:

Name: _____ Phone: _____

Address: _____ Date of Birth: _____

City/State/Zip: _____ Email Address: _____

Assessor's ID No. (AIN) # _____

***CONTIGUOUS PARCELS ONLY:** If you own one or more parcel "contiguous" (touching) to the main parcel, list the number(s) below or write "see attached" and attach a separate sheet. (A property tax bill is required for each parcel.)

2. CHECK ONE OF THE OPTIONS BELOW:

- Please remove me from the mailing list/database. I can re-apply in the future by contacting SMMUSD.
- I would like to apply for the senior exemption. [Sign and proceed to #3 and #4.]

Affidavit of Residency / Penalty of Perjury Clause (required by Senior who provided proof of age):

I hereby certify that I personally own and occupy the real property listed above, that I use the real property as my primary place of residence, and that I do not rent, lease, or sub-lease the property. I declare under penalty of perjury that the information I have provided in this Application is true and correct eligibility and may be verified / audited at any time during the tax year by school district or program officials.

Signature of Senior Citizen Exemption Applicant

Date Signed

3. Attach ALL Copies of Documentary Proof of Satisfaction of Exemption Requirements:

- AGE (California Driver's License or Identification Card)
- PROPERTY OWNERSHIP (Your current property tax bill)
- RESIDENCY (Only if your CA Driver's License or Identification Card and property tax bill does not satisfy the residency requirement. Vehicle registration, voter's registration, or utility bills not typically paid for by a landlord.)
- SELF-ADDRESSED STAMPED ENVELOPE (SASE) (Optional: Submit SASE to get proof of submission receipt.)

4. RETURN TO: SMMUSD, 1651 16th St., Santa Monica, CA 90404-3801 ATTENTION: MEASURE R

*******This form must be received on or before June 30, 2017*******

This space reserved for Santa Monica-Malibu Unified School District Office Use Only

Renewal Approved _____ Renewal 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.

[See other side for additional information]

Revised 8/22/16

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 DISTRICTSPECIAL 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 your application is returned by the June 30th deadline, the Measure R parcel tax charge is removed before the property tax bill is printed and mailed to you in October.

REMINDERS:

- ❖ **EXEMPTION APPLICATIONS MUST BE SUBMITTED AND RENEWED EACH YEAR.**
- ❖ To comply with the annual requirements, a renewal form (similar to this one) will be mailed to you in April of each year, which must be completed, signed and returned by June 30th each year. SMMUSD is not responsible for undelivered mail. If you do not receive the renewal, contact the Measure R Office at (310) 450-8338, ext. 70263 no later than May 1st.
- ❖ Annual deadlines are typically June 30th each year, but are subject to change. It is the senior applicant’s responsibility to confirm the due date for the year they wish to apply.
- ❖ Address labels are used to mail renewal forms to over 3,500 addresses. Do not mistake this mailing for “junk” mail, but open all mail from Santa Monica-Malibu Unified School District during the renewal period (April – June). SMMUSD is not responsible for forms sent, but not returned by the application deadline.
- ❖ Do not delay returning the form if you cannot find your Assessor’s ID Number (AIN); we have it.
- ❖ SPOUSES: If both of you are over 65 years of age and submitted your proof of age, either person may sign the form. This is strongly encouraged if one spouse is unable to sign the renewal application during the application process.
- ❖ For a receipt as proof of submission: Enclose a self-addressed, stamped envelope when mailing the application form. When dropping off the form in person at 1651 16th Street, Santa Monica, a receipt may be requested from the receptionist.
- ❖ **HOW TO READ YOUR PROPERTY TAX BILL:** When the form is received by the annual deadline, your application is processed and your Assessor’s ID Number is given to the Auditor-Controller. Their office calculates the total amount of the property tax bill, including the various Direct Assessment accounts from various agencies for collection purposes. The Office of the Assessor prints and mails your property tax bill in October – WITHOUT the parcel tax. If you are charged for the parcel tax, it will be listed under the Direct Assessments portion of the bill itemized as: SMMUSD-MEAS-R. **You received your exemption if the tax line-item is NOT listed under Direct Assessments. Senior exemptions are not applicable to ad valorem tax or voted indebtedness which is voter-approved taxes levied against a property.**

[See other side for Application Form]

Revised 8/22/16