



TAX RELIEF

GUIDE FOR SENIORS 65+
DISABLED HOMEOWNERS
DISABLED VETERANS

TAX FREEZE

CONNECT

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REAL ESTATE TAX RELIEF

PRESENTED BY



ERICA GILMORE
Metropolitan Trustee





TAX RELIEF FOR DISABLED VETERANS

Requirements:

- Driver's license or State ID
- Applicant must own and live on property
- Applicant's name must be on the deed
- Spouses of deceased disabled veterans who may qualify must provide a death certificate and veteran's social security number

Veterans qualify if they have:

1. A service-connected disability; i.e. paraplegia or permanent paralysis of both legs and lower part of body resulting from traumatic injury, or disease to the spinal cord or brain, or loss of two or more limbs, legal blindness
2. Total and permanent disability rating from a service-connected disability
3. 100% total and permanent disability rating from being a prisoner of war
4. Must not have been dishonorably discharged and must have been disabled by December 31, 2020

*Property tax relief shall be extended to the surviving spouse of a disabled veteran who at the time of death was eligible for property tax relief, if they have not remarried.

TAX RELIEF FOR SENIORS

Homeowner must be 65 by 12-31-2020

The combined 2019 income of all owners, and married couples, even if both names are not on the deed, cannot exceed \$30,700.

Requirements:

- Proof of Age: Driver's License or State ID
- Applicant must own and live on property
- Applicant's name must be on the deed
- Proof of Residence: Voter's registration card
- 2019 Federal Income tax return with all supporting documents – spouse included or 2019 Bank Statement (1 month)
- Medicare card

2019 annual income determined by sources including, but not limited to:

- Social Security less Medicare deduction (please provide SSA-1099)
- Retirement, IRA, or pension benefits
- Veteran's Administration benefits
- Workers' Compensation Salaries or Wages
- Interest or Dividends

TAX RELIEF FOR SPOUSES OF DECEASED HOMEOWNER

When an applicant is deceased, property tax relief shall be extended to the surviving spouse who at the time of death was eligible for property tax relief. If there is no surviving spouse and the voucher was not used by applicant prior to death, there is no proration and the voucher will not be honored.

TAX RELIEF FOR THE DISABLED

The combined 2019 income of all owners, and married couples, even if both names are not on the deed, cannot exceed \$30,700.

Requirements:

- Proof of Disability: Current SSA or SSI award letter. Must have been disabled by Dec. 31, 2020
- Applicant must own and live on property
- Applicant's name must be on the deed
- Proof of Residence: Driver's license, State ID, or voter's registration
- 2019 Federal Income tax return with all supporting documents – spouse included
- Medicare card

TAX FREEZE

Homeowner must be 65 by 12-31-2020

The combined 2019 income all owners, and married couples, even if both names are not on the deed, cannot exceed \$43,810.

Requirements:

- Proof of Age: Driver's License or State ID
- Proof of Residence: Voter's registration
- 2019 Federal Income Tax return with all supporting documents – spouse included
- Medicare card

2019 annual income determined by sources including, but not limited to:

- Social Security less Medicare deduction (please provide SSA-1099)
- Retirement, IRA, or pension benefits
- Veteran's Administration benefits
- Workers' Compensation Salaries or Wages
- Interest or Dividends