



From the office of Jenny Fields, CFA
Martin County Property Appraiser

Information Required for Homestead Exemption Application

The following information is required for all owners residing on the property who wish to file for Homestead Exemption. One spouse may apply for the other provided they bring the other spouse's information. Homebound persons should contact the Property Appraiser's office to arrange a home visit to file an application. We are at your service and would be happy to assist you.

- Florida Voter Registration information, which **MUST** reflect the address of the homesteaded property.
- Florida Driver's License information. If you do not hold a valid driver's license, Florida ID card information must be presented.
- Florida Vehicle Registration information if you own or drive a vehicle in Florida (including leased vehicles).
- Social Security Number. If married, even if your spouse is not an owner of the property, you must submit his/her Social Security Number as well. Per Florida Statute 196.011(1)(b), the Property Appraiser's Office may not grant an application for exemptions if the applicant refuses to disclose his/her Social Security number, or that of their spouse.
- Owners who have transferred the interest of their residential property into a trust must have their attorney complete the "Trust Certificate" – which is available under the 'Forms – Exemption Forms' section of our website. The Property Appraiser must be able to determine who has current beneficial interest in the trust to determine who may be eligible to qualify for Homestead Exemption.
- If you are not a U.S. citizen, but have a permanent resident card, you may qualify for Homestead Exemption. You must provide a copy of both the front and back of your permanent residency card.

If you prefer to file online, please visit <https://www.pa.martin.fl.us/homestead-exemption/apply-online>.

Continue to Application

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ORIGINAL APPLICATION FOR HOMESTEAD AND RELATED TAX EXEMPTIONS

DR-501
R. 08/25
Rule 12D-16.002,
F.A.C.
Page 1 of 5
Effective 08/25

Permanent Florida residency required **on January 1**.
Application due to property appraiser **by March 1**.
Complete pages 1 through 3

| | | |
|---|--|--|
| County _____ | Tax Year _____ | |
| I am applying for homestead exemption <input type="checkbox"/> New or <input type="checkbox"/> Change | | |
| Property Information | | |
| Homestead address _____ | Mailing address, if different _____ | |
| Parcel identification number or legal description _____ | | |
| Type of deed _____ | Date of deed _____ | |
| Recorded: Book _____ Page _____ Date _____ | or Instrument number _____ | |
| Is the property in a trust? <input type="checkbox"/> Yes <input type="checkbox"/> No Name of trust on the property deed _____ | | |
| Applicant / Co-applicant Information | | |
| | Applicant | Co-applicant/Spouse |
| Name | | |
| Phone number | | |
| *Social Security # | | |
| Date of birth | | |
| Are you a US Citizen? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If not a US Citizen, provide Immigration # or Resident Alien Card # | <input type="checkbox"/> Immigration # or <input type="checkbox"/> Resident Alien Card # | <input type="checkbox"/> Immigration # or <input type="checkbox"/> Resident Alien Card # |
| % of ownership | | |
| Date homestead was established | | |
| Name and address of any owners not residing on the property _____ | | |
| Marital status of Applicant <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Other, Explain _____ | | |
| Marital status of Co-applicant <input type="checkbox"/> Single <input type="checkbox"/> Married <input type="checkbox"/> Divorced <input type="checkbox"/> Widowed <input type="checkbox"/> Other, Explain _____ | | |
| Co-applicant relationship to Applicant (Example: Spouse, parent, sibling) _____ | | |
| Do you currently claim residency or homestead in another county or state? Applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No Co-applicant? <input type="checkbox"/> Yes <input type="checkbox"/> No | | |
| Address of current or previous homestead: _____ | | |
| Date current or previous homestead was established and ended, if applicable: _____ | | |
| You may also qualify for a Portability benefit if you previously lived in another Florida county any of the 3 immediately preceding years. A separate application is required, see page 5 for more information. | | |

*Disclosure of your social security number is mandatory. It is required by section 196.011(1)(b), Florida Statutes. The social security number will be used to verify taxpayer identity and homestead exemption information submitted to property appraisers.

Please provide as much information as possible. Your county property appraiser will make the final determination.

| Proof of Residence | Applicant | Co-applicant/Spouse |
|---|--|--|
| Previous residency outside Florida and date terminated | date | date |
| FL driver license or ID card number | date | date |
| Florida vehicle tag number | | |
| Florida voter registration number (if US citizen) | date | date |
| Declaration of domicile, enter date | Recorded date OFFICE USE ONLY | Recorded date OFFICE USE ONLY |
| Current employer | | |
| Address on your last IRS return | | |
| School location of dependent children | OFFICE USE ONLY | OFFICE USE ONLY |
| Bank statement and checking account sent to homestead address | <input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY | <input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY |
| Proof of payment of utilities at homestead address | <input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY | <input type="checkbox"/> Yes <input type="checkbox"/> No OFFICE USE ONLY |

In addition to homestead exemption, I am applying for the following benefits.

See page 4 for qualification and required documents. ¹Please note some exemptions or benefits may require additional applications.

By local ordinance only:

- Age 65 and older with limited income (amount determined by ordinance) ¹
- Age 65 and older with limited income and permanent residency for 25 years or more ¹
- \$5,000 widowed \$5,000 blind \$5,000 totally and permanently disabled
- Total and permanent disability – quadriplegic ¹
- Certain total and permanent disabilities - limited income and hemiplegic, paraplegic, wheelchair required, or legally blind
- First responder totally and permanently disabled in the line of duty or surviving spouse
- Surviving spouse of first responder who died in the line of duty
- Disabled veteran discount, 65 or older which carries over to the surviving spouse ¹
- Veteran disabled 10% or more
- Disabled veteran confined to wheelchair, service-connected
- Service-connected totally and permanently disabled veteran or veteran’s surviving spouse. Applicants for this exemption qualify for a prorated refund of previous year’s taxes if in the previous year they acquired this parcel between January 1 and November 1 and provide proof of the disability as of January 1 of that tax year². If you received the same exemption on another parcel in the previous year, enter the previous parcel information in the space provided.
Parcel number _____ County _____.
- Surviving spouse of veteran who died while on active duty. Applicants for this exemption qualify for a prorated refund of previous year’s taxes if in the previous year they acquired this parcel between January 1 and November 1 and provide an official letter². If you received the same exemption on another parcel in the previous year, enter the previous parcel information in the space provided.
Parcel number _____ County _____.
- Other, specify: _____

¹ This type of exemption or benefit requires an additional application. See page 4 for information.

²See page 4 Forms and Documents for acceptable forms of proof.

File the signed application for exemption with the county property appraiser.

I authorize this agency to obtain information to determine my eligibility for the exemptions applied for. I qualify for these exemptions under Florida Statutes. I own the property above and it is my permanent residence or the permanent residence of my legal or natural dependent(s). (See s. 196.031, Florida Statutes.)

I understand that under section 196.131(2), F.S., any person who knowingly and willfully gives false information to claim homestead exemption is guilty of a misdemeanor of the first degree, punishable by imprisonment up to one year, a fine up to \$5,000, or both.

I have read, or have had someone read to me, the contents of this form.

I certify all information on this form and any attachments are true, correct, and in effect on January 1 of this year.

| | | | |
|-------------------------------|---------------|----------------------------------|---------------|
| | | | |
| _____ Signature, applicant | _____ Date | _____ Signature, co-applicant | _____ Date |

Contact your local property appraiser if you have questions about your exemption.

File the signed application for exemption with the county property appraiser.

| | | | |
|--|---------------|---------------------|---------------|
| | | | |
| _____ Signature, property appraiser or deputy | _____ Date | _____ Entered by | _____ Date |

References

This form mentions the following documents, which are incorporated by reference in Rule 12D-16.002, F.A.C. The forms may be available on your county property appraiser's website or the Department of Revenue's website at floridarevenue.com/property/forms.

| Form | Form Title |
|-------------|--|
| DR-416 | Physician's Certification of Total and Permanent Disability |
| DR-416B | Optometrist's Certification of Total and Permanent Disability |
| DR-501A | Statement of Gross Income |
| DR-501DV | Application and Return for Homestead Tax Discount, Veterans Age 65 and Older with a Combat-Related Disability and Surviving Spouse |
| DR-501SC | Adjusted Gross Household Income, Sworn Statement and Return |

PENALTIES

The property appraiser has a duty to put a tax lien on your property if you received a homestead exemption during the past 10 years that you were not entitled to receive. The property appraiser will notify you that taxes with penalties and interest are due. You will have 30 days to pay before a lien is recorded. If this was not an error by the property appraiser, you will be subject to a penalty of 50 percent of the unpaid taxes and 15 percent interest each year (see ss. 196.011(10) and 196.161(1)(b), F.S.).

If you improperly receive a homestead exemption as a result of the property appraiser's clerical mistake or omission, you will not be assessed penalties or interest.

For tax years beginning in 2025, if you improperly receive an exemption as a result of the property appraiser's clerical mistake or omission, and you disclose the error to the property appraiser before you receive a notice of intent to record a lien, you will not be charged back taxes, penalties or interest. For special requirements for estates probated or administered outside Florida, see s. 196.161(1), F.S.

The information in this application will be given to the Department of Revenue. Under s. 196.121, F.S., the Department and property appraisers can give this information to any state where the applicant has resided. Social security numbers will remain confidential under s.193.114(5), F.S.

EXEMPTION AND DISCOUNT REQUIREMENTS

Homestead Every person who owns real property in Florida on January 1, makes the property his or her permanent residence or the permanent residence of a legal or natural dependent, and files an application with the county property appraiser's office, may receive a property tax exemption up to \$50,000 of the assessed value. The first \$25,000 applies to all property taxes, including school district taxes. For the first year of your exemption, the added \$25,000 applies to assessed value over \$50,000 and only to non-school taxes. If you remain in the home and keep your homestead exemption, the added \$25,000 exemption will increase annually on January 1 for inflation by the percentage change in the Consumer Price Index (CPI), if the percentage change is positive. See s. 196.031(1)(b), F.S.

The Consumer Price Index (CPI) is a measure of consumer price changes. The Bureau of Labor Statistics of the United States Department of Labor calculates the CPI statistics using the All Urban Consumers, U.S. City Average, all items 1967=100, or successor reports for the preceding calendar year. The Department has additional information about CPI posted on the website [Florida Department of Revenue – Property Tax – Consumer Price Index \(floridarevenue.com\)](https://www.floridarevenue.com/PropertyTax/ConsumerPriceIndex). The Department will provide the CPI data to the county property appraisers to be used on homestead exemption calculations on applicable properties.

Your local property appraiser will determine whether you are eligible. The appraiser may consider information such as the items requested on page 2.

Save our Homes (SOH) Beginning the year after you receive homestead exemption, the assessment on your home cannot increase by more than the lesser of the change in the Consumer Price Index or 3 percent each year, no matter how much the just value increases. If you have moved from one Florida homestead to another within the last three years, you may be eligible to take some of your SOH savings with you. See your property appraiser for more information.

**This page does not contain all the requirements that determine your eligibility for an exemption.
Consult your local property appraiser and Chapter 196, Florida Statutes, for details.**

| Added Benefits Available for Qualified Homestead Properties | | | | |
|---|--|--|--|----------------|
| | Amount | Qualifications | Forms and Documents^{1,2} | Statute |
| Exemptions | | | | |
| Local option, age 65 and older | Determined by local ordinance | Local ordinance, limited income | Proof of age DR-501SC, household income | 196.075 |
| | The amount of the assessed value | Local ordinance, just value under \$250,000, permanent residency for 25 years or more. | DR-501SC, household income | |
| Widowed | \$5,000 | | Death certificate of spouse | 196.202 |
| Blind | \$5,000 | | Florida physician, DVA ³ , or SSA ⁴ | 196.202 |
| Totally and Permanently Disabled | \$5,000 | Disabled | Florida physician, DVA ³ , or SSA ⁴ | 196.202 |
| | All taxes | Quadriplegic | 2 Florida physicians or DVA* | 196.101 |
| | All taxes | Hemiplegic, paraplegic, wheelchair required for mobility, or legally blind Limited income | DR-416, DR-416B, or letters from 2 FL physicians (For the legally blind, one can be an optometrist.) Letter from DVA ³ , and DR-501A, household income | 196.101 |
| Veterans and First Responders Exemptions and Discount | | | | |
| Disabled veteran discount, age 65 and older which carries over to the surviving spouse | % of disability | Combat-related disability | Proof of age, DR-501DV Proof of disability, DVA ³ , or US government | 196.082 |
| Veteran, disabled 10% or more by misfortune or during wartime service | Up to \$5,000 | Veteran or surviving spouse | Proof of disability, DVA ³ , or US government | 196.24 |
| Veteran confined to wheelchair, service-connected, totally disabled | All taxes | Veteran or surviving spouse | Proof of disability, DVA ³ , or US government | 196.091 |
| Service-connected, totally and permanently disabled veteran or surviving spouse | All taxes | Veteran or surviving spouse | Proof of disability, DVA ³ , or US government | 196.081 |
| Surviving spouse of veteran who died while on active duty | All taxes | Surviving spouse | US Government or DVA ³ letter attesting to the veteran's death while on active duty | 196.081 |
| First responder totally and permanently disabled in the line of duty or surviving spouse | All Taxes | First responder or surviving spouse | Proof of Disability, employer certificate, physician's certificate and SSA ⁴ (or additional physician certificate) | 196.102 |
| Surviving spouse of first responder who died in the line of duty | All taxes | Surviving spouse | Letter attesting to the first responder's death in the line of duty | 196.081 |
| ³ DVA is the US Department of Veterans Affairs or its predecessor. ⁴ SSA is the Social Security Administration. | | | | |
| Save Our Homes Portability Transfer of Homestead Assessment Difference Benefit | | | | |
| Save Our Homes Assessment Limitation and Portability Transfer | The accumulated difference between the assessed value and the just value | Had homestead from a previous Florida county to a new homestead | DR-501T, Transfer of Homestead Assessment Difference | 193.155 |



From the office of Jenny Fields, CFA
Martin County Property Appraiser

Florida Residency Affidavit

1. I do not, nor does my spouse (if married), claim a real property or ad valorem tax exemption for the tax year_____, in any other county, municipality or taxing district within the United States of America. Such exemptions include, but are not limited to, homestead or homeowner’s exemption, veteran’s exemption, disability exemption, seniors exemption, school tax relief, property tax rebate or refund, circuit breaker grant, property tax credit or percentage reduction.

I am a Florida resident

My spouse is a Florida resident

My spouse is a resident of_____.

2. I do not, nor does my spouse (if married), receive any other type of benefit based on permanent residency such as payment of dividends or health benefits, in any other state, county, municipality or other taxing district within the United States of America.

3. I understand that Section 196.131(2), Florida Statutes, provides that any person who knowingly and willingly gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable as provided in Section 775.082, Florida Statutes, or by a fine not exceeding \$5,000 or both.

Affiant Signature

Affiant Signature

Print Name

Print Name

Date

Date

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