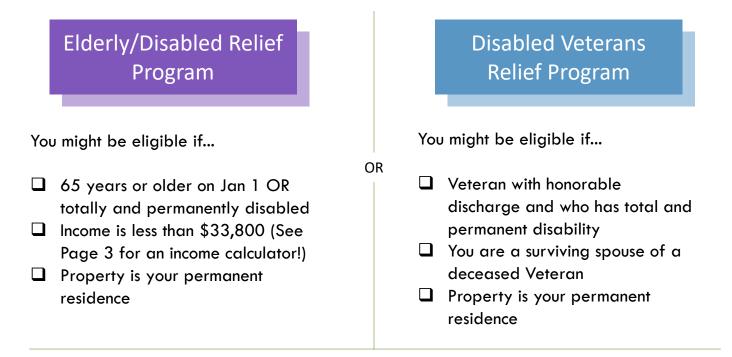
Which program is right for me?

You may qualify for more than one program but can only receive benefits from one. Compare benefits on page 2 to help decide the right program for you.

Programs to Pay Less on Your Tax Bill

Apply Once and Automatically Receive Relief Each Year



Program to Defer Part of Your Tax Payment Until a Later Date*

Apply Each Year to Keep Getting Benefit



Consider this if your income is too high for Elderly/ Disabled Relief.

You might be eligible if...

- 65 years or older on Jan 1 OR totally and permanently disabled
- □ Income is less than \$50,700
- Own the property and live in it as a permanent residence, for at least five years
- * Disqualify Event Death, Transfer of Property, Change in Permanent Residence



1

How much will I save from these programs?

Use these quick and easy tables to estimate your savings.*

Elderly/Disabled Relief Program

Assessed Property Value		Potential Savings	
\$	25,000	\$	181
\$	35,000	\$	181
\$	50,000	\$	181
\$	75,000	\$	271
\$	100,000	\$	361
\$	150,000	\$	542
\$	200,000	\$	722
\$	250,000	\$	903
\$	300,000	\$	1,083
\$	400,000	\$	1,444
\$	500,000	\$	1,806

Disabled Veterans Relief Program

Assessed Property Value		Potential Savings	
\$	25,000	\$	181
\$	35,000	\$	253
\$	50,000	\$	325
\$	75,000	\$	325
\$	100,000	\$	325
\$	150,000	\$	325
\$	200,000	\$	325
\$	250,000	\$	325
\$	300,000	\$	325
\$	400,000	\$	325
\$	500,000	\$	325

* Benefit charts are based on average Durham County property tax rates. Actual benefit will depend on your municipality/special districts.



How do I calculate my income?

Income is required to determine eligibility for Elderly/Disabled and Circuit Breaker Programs.

Elderly/ Disabled Relief Income Requirement: < \$33,800 Circuit Breaker Income Requirement: < \$50,700

Total income: The sum of the following items for both you & your spouse (if married):

- Wages (includes salaries and tips) employment earnings
- ✓ Interest (includes both taxable and tax exempt) money earned in bank accounts
- Dividends payments received from invested stocks
- Capital Gains profit made on stocks, real estate, etc.
- ✓ IRA Distributions funds taken from IRA account(s)
- ✓ Pensions and Annuities payments from previous employers (ex. retirements)
- Disability Payments government checks for disability programs
- ✓ Social Security Benefits (which includes both taxable and tax exempt; requires a copy of your 1099 from the SS office)

✓ Any other moneys received

Nancy's Story

Nancy is a 75-year-old woman from Durham with the following income:

- Dividends: \$1,143
- Capital Gains: \$3,150
- IRA Distributions: \$15,887
- Pensions: \$9,510
- Social Security Benefits: \$5,100
- TOTAL: \$34,790

Nancy is ineligible for the Elderly/Disabled Program but can apply for a deferral through the Circuit Breaker Program.



Have more questions? Durham County Tax Administration is here to help.



Visit Our Office

201 East Main Street, 3rd Floor Durham, NC 27701



Send Us An Email

TaxLandRecords@dconc.gov



Call Our Team

(919) 560 - 0300



Visit Our Website

dconc.gov/tax



What information do I need to fill out my application?

Elderly/Disabled Relief Program Complete Page 1 & Parts 2, 5, 6

Required documentation:

- If below 65 years of age and you or spouse are totally or permanently disabled – complete Form AV-9A Certification of Disability
- Copy of First Page of Individual Federal Income Tax Return (unless you do not file one)
- If you do not have a Federal Income Tax Return, provide documentation of income received (W2, 1099s, all year end financial statements, etc.)

Required documentation:

Disabled Veterans Relief Program Complete Page 1 & Parts 3, 6

Complete Form NCDVA-9 Certification for Disabled Veteran's Property Tax Exclusion

Form must be certified by an accredited Veterans Service Officer at a State Veterans Service Center or a Local County Veterans Service Center.

Circuit Breaker Program Complete Page 1 & Parts 4, 5, 6

Required documentation:

- If below 65 years of age and you or spouse are totally or permanently disabled – complete Form AV-9A Certification of Disability
- Copy of First Page of Individual Federal Income Tax Return (unless you do not file one)
- If you do not have a Federal Income Tax Return, provide documentation of income received (W2, 1099s, all year end financial statements, etc.)



Please complete this survey about your experience and submit with your relief application.

1 (Strongly Disagree)	2	3	4	5 (Strongly Agree)
understand the value	of the tax relief pro	ogram.		
1 (Strongly Disagree)	2	3	4	5 (Strongly Agree)
found the application	process to be clear	and straightforward.		
1 (Strongly Disagree)	2	3	4	5 (Strongly Agree)
	pleting the applicati	on.		
felt comfortable comp				
felt comfortable comp 1 (Strongly Disagree)	2	3	4	5 (Strongly Agree)
felt comfortable comp 1 (Strongly Disagree) feel like this mailer ho	2			(Strongly Agree)

Other comments to share with us?

If you'd like, please share a quote about your experience for future applicants.

