



Dr. Tracy Smith
Superintendent

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Novato, CA 94945

T: (415) 897-4259
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Dear Property Owner:

Per NUSD Board Policy 3210 – Parcel Tax, Novato property owners, [age 65 or older](#), qualify for a Senior Parcel Tax Exemption provided the property is the applicant's legal, principal residence in which they currently live.

As requested, the senior exemption application form is enclosed. **Please complete and sign** the application and return it to our office with the following information:

1. Current Property Tax Bill (**COPY**)
2. Proof of Birth Date (i.e. **COPY** of driver's license, state identification card, passport or birth certificate).
3. Proof of Residence (**COPY**)
If your identification contains an address other than that for which you are requesting exemption, please submit a **copy** of a utility bill that includes your name, the physical address of the property, and dated within six months of the application date (i.e.: electric, water, garbage, cable, home phone, current homeowner insurance document, etc.).
4. Pages from Trust Instrument (if applicable) (**COPY**)
If ownership of your home is held under a trust instrument (TR) please submit a copy of the following pages:
 - First Page
 - The Page that names applicant as Beneficiary of the Trust or the page that states the trust is to be applied for applicant's benefit
 - Signature Page
 - Property Description Page, within trust (Exhibit/Schedule), referencing the parcel /lot number for applicant's property or property address

If you have questions, or need assistance, please contact Ginna Mohan: **415-493-4257** or gmohan@nusd.org.

Return complete, signed application and required documents by any of the following methods:

Fax: 415-898-5790

Email: gmohan@nusd.org

Mail: Novato Unified School District
ATTN: Senior Exemptions
1015 Seventh Street
Novato, CA 94945

IMPORTANT NOTIFICATIONS:

- ▶ All timelines and procedures for establishing an exemption must be strictly observed; retroactive exemption requests will not be recognized or awarded.
- ▶ **No refunds** will be made of taxes paid on property for which the property owner did not establish a timely exemption.
- ▶ Refund requests, except provided above, shall be determined by the District or County of Marin as applicable.
- ▶ Once approved, NUSD notifies the Marin County Department of Finance; applicants are notified of approval via mail.
- ▶ Approved senior exemptions are continuous as long as applicants remain eligible; [applicants are not required to re-apply each year](#).

APPLICATION FOR PARCEL TAX SENIOR EXEMPTION

**** Applications MUST be submitted no later than December 31 of the current tax year ****

(please submit your application as early as possible to prevent delays in processing)

Qualification requirements for a Parcel Tax Senior Exemption on a single-family residence during any tax year (July 1-June 30):

1. Applicant is **age 65 before December 31st** of the qualifying tax year
2. Applicant is the beneficial owner* or owner of record for parcel
3. Parcel is applicant's **principal residence**

To apply for the Parcel Tax Senior Exemption, please complete and sign this form and return it with the **required paperwork** (see enclosed information letter):

Fax: 415-898-5790

Email: gmoohan@nUSD.org

Mail: Novato Unified School District
ATTN: Senior Exemptions
 1015 Seventh Street
 Novato, CA 94945

★ For assistance, please contact Gina Mohan
415-493-4257 or gmoohan@nUSD.org

APPLICANT'S NAME (please print): _____

PARCEL ADDRESS: _____

Is this address your principal place of residence? YES NO

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Mailing Address City State Zip

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Birth Date Parcel Number Daytime Phone E-Mail Address

I claim the parcel tax senior exemption as:

- a) Owner of Record
- b) A beneficial owner under a trust instrument
- c) Other (please state) _____

If you checked (b) or (c) above please provide a copy of the instrument or document under which you claim beneficial ownership (see enclosed information letter for required documents). Beneficial ownership indicates that you have title in your name, or a trustee, or other fiduciary who acts on your behalf, may hold title for your benefit, such as a partner, a corporation, a lessor, an obligee under contract of sale, etc.

I declare under penalty of perjury that the foregoing is true and correct,

Applicant Signature: X _____ Date: _____

City: _____ County: _____, California

NOTE:

- ▶ Approved Parcel Tax Senior Exemptions are continuous as long as applicants remain eligible; **applicants are not required to re-apply each year.**