



Gary J. Gregor, CFA, AAS
Walton County
Property Appraiser

**ADDENDUM TO HOMESTEAD EXEMPTION
APPLICATION (SEPARATE FAMILY UNITS)**

PARCEL #: _____

TAX YEAR _____

NAME: _____ SITE ADDRESS: _____

A married couple or family unit is allowed to claim only one homestead exemption or residency based tax exemption (FL Constitution Article VII Section 6(b)). Please answer the questions below and attach documentation as requested, so that we may determine your eligibility to qualify for homestead exemption.

1. Have you and your spouse divorced? Yes No If yes, date of divorce _____
If yes, attach a copy of the Final Judgment if recorded outside Walton County, and skip questions 2-15. Sign and return.
2. Is a divorce pending? Yes No *If yes, attach copies of filed documents.*
3. Are you separated from your spouse? Yes No If yes, since (date) _____
4. What is the date of your marriage? _____ Spouse's Name _____
5. Spouse's Address _____
6. Spouse's Phone Number _____
7. Does your spouse claim a homestead or ANY residency based tax exemption in Florida, any other state or jurisdiction? (Including District of Columbia and Puerto Rico) Yes No

If you checked NO for question 7, attach proof that your spouse does not benefit from a residency based tax exemption, and skip questions 8 – 15. Sign and return.

If you checked YES for question 7, answer remaining questions below in order to determine your eligibility for an exemption under the Separate Family Units status. Sign and return.

8. Do you spend time in the other's home or go back and forth between them? Yes No
9. Do you travel, vacation, or socialize with your spouse? Yes No
10. Do you and your spouse maintain separate bank or financial accounts? Yes No
11. Do you have any bank or financial accounts (including, but not limited to, credit card, retirement, or investment accounts) in both names? Yes No
12. Are you a mortgagor on your spouse's home, or is your spouse a mortgagor on yours? Yes No
13. Are you listed as a beneficiary on any insurance policy, trusts, wills or financial account owned by your spouse or is your spouse listed as a beneficiary on any insurance policy, trust, will, or financial account owned by you? Yes No
14. Do you file your IRS return separately from your spouse? Yes No

Attach a copy of most recent IRS tax return. You may redact income and social security numbers.

15. Do you provide support to OR receive support from your spouse in any form including but not limited to: insurance coverage or premium payments, mortgage assistance or payment, utility payments, car payments, or any other form of financial payments or assistance? DOES NOT INCLUDE court ordered alimony or child support. Yes No

I understand that additional documentation may be required. I understand that under section 196.131(2), Florida Statutes, any person who knowingly gives false information to claim homestead exemption is guilty of a first-degree misdemeanor, punishable by imprisonment up to 1 year, a fine up to \$5,000 or both. Under penalties of perjury, I declare that I have read the foregoing addendum and the facts in it are true.

Signature (Required)

Date

Daytime Phone



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PARCEL #: _____

NAME: _____

Separate Family Unit Checklist
(Copies of the following must be attached to the application)

- _____ Drivers License
- _____ Voters Registration
- _____ Vehicle Registration
- _____ Copies of Bank Statements
- _____ Copy of Annual IRS Return
- _____ Utility Bills
- _____ Cancelled check for:
 - _____ Real Estate Taxes
 - _____ Mortgage Payments
- _____ Home Owners Insurance Policy
- _____ Notarized Separation Papers