



Eddie Cook  
Maricopa County Assessor

**2021 SENIOR VALUATION PROTECTION INFORMATION AND APPLICATION**

**Purpose:** To freeze application year **Limited Property Value** of a Primary Residence owned by seniors based on income, age and residency. For property located in Maricopa County only. It is important to note that this program **does not freeze your property TAXES, it freezes the taxable portion of your property VALUE.**

**Application and supporting documentation deadline:** September 1, 2021.

Applicants qualified by September 1<sup>st</sup> will be notified by December 1<sup>st</sup> of application year. Applications after September 1<sup>st</sup> will be processed for the following year.

**Mail To:** Maricopa County Assessor, Senior Valuation Protection, 301 W Jefferson St, Phoenix, Arizona 85003

**Phone:** 602-506-3406, by fax: 602-506-7620 or by email: [PE.SVP@maricopa.gov](mailto:PE.SVP@maricopa.gov)

**\*\*\*Important Requirements for Applicant\*\*\***

**Please black out your Social Security numbers and account numbers to protect your identity.**

**In order to prevent delays in processing your application, please ensure the following documentation is included with your application: (Please do not use staples, tape or glue)**

\_\_\_\_\_ 1. Applicant Proof of Age: **Minimum age of 65** for at least one owner on title.

- Driver's License *or*
- Birth Certificate *or*
- Passport

\_\_\_\_\_ 2. Applicant Proof of Primary Residence for 2 years (Note: This document must show your physical address *and* be at least 2 years old). Owner name must be on title of property.

- Driver's License *or*
- State Issued ID Card *or*
- Voter Registration

\_\_\_\_\_ 3. Documentation of ALL sources of Income, TAXABLE & NON-TAXABLE; for Owner & Co-Owners of the Property for 2018, 2019, & 2020. Income limits for the 2021 application year are \$38,112 for one owner, and \$47,640 for two or more property owners.

- Copies of your **SIGNED, AZ TAX RETURNS** or Federal 1040 tax returns *or*
- Social Security (Form SSA-1099 Statements)
- Interest / Dividends (Form 1099-R Statements)
- Wages / Salary / Tips (Form W2 Statements)
- Pension / Annuity / IRA / (Form 1099-R Statements; include any rollover documentation)
- Capital Gains / Rent & Royalties (Form 1099-B / 1099 Misc. Statements)
- Veteran's Benefits (Award Letter or bank statements reflecting deposit amount)
- Welfare Benefits (e.g., Alimony, Workman's Comp., etc.)

\_\_\_\_\_ 4. Applicant(s)' signatures on completed application.

**Contacts to obtain copies of your income documentation**

Social Security Administration 1-800-772-1213

Veteran's Administration 1-800-827-1000

Internal Revenue Service 1-800-906-9887 "Tax Return Transcripts" are required in lieu of Tax Returns.

*If qualified, owners must renew every 3 years. Renewal applications will be sent 6 months prior to the deadline of September 1st of renewal year.*

