

POLK COUNTY

Property Appraiser Neil Combee

AFFIDAVIT OF SEPARATION - PAGE 1 of 2

A married couple or family unit is entitled to only one homestead or similar residency based exemption (Florida Constitution, Article VII Section 6(b)). In rare instances, a married couple may qualify for more than one exemption, but it must be demonstrated that they are financially independent of one another and have clearly established separate family units. The determination of what constitutes separate family units is based on two primary considerations: financial separateness and whether or not there is an intact marriage. Please provide the following information and documentation so that eligibility for homestead exemption can be determined.

To be eligible for Homestead Exemption Florida Statutes require the social security number of the applicant and the applicant's spouse be provided; even if the couple is separated or if the spouse does not own or live on the property.

Parcel Number:	Date:		Application Year:		
Applicant Name:		Spouse Name:			
Applicant SSN:		Spouse SSN:			
Applicant Phone Number:		Spouse DOB:			
Applicant Email Address:		Spouse Email Address:			
Applicant Mailing Address:		Spouse Mailing Address:			
Applicant Site Address:		Spouse Site Address:			
Date Married:	Date Separated:	s a divorce pending? If yes, o	attach copies of filed docume	ents.	
RESIDENCY BASED EXEMPTIO	NS CLAIMED BY SPOUSE			YES	NO
Does your spouse claim a hom	estead exemption or ANY residency bas	ed tax exemption in Florida	?		
	estead exemption or ANY residency bas				
Please provide the address of	the property that is receiving residency	based tax exemption:			
•	,	•			
FINANCIAL STATUS				YES	NO
	I time in the other's home or go back an	d forth between them?		YES	NO
Do you and your spouse spend	I time in the other's home or go back an I, vacation, or socialize with each other?			YES	NO
Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint	l, vacation, or socialize with each other? cain ANY joint bank or financial accounts	?		YES	NO
Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint Do you and your spouse have	, vacation, or socialize with each other? cain ANY joint bank or financial accounts any credit cards, retirement, or investme	? ent accounts or other lines		YES	NO
Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint Do you and your spouse have Are you listed as a beneficiary	, vacation, or socialize with each other? cain ANY joint bank or financial accounts any credit cards, retirement, or investment on any insurance policy or financial acco	? ent accounts or other lines ount owned by your spouse		YES	NO
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Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint Do you and your spouse have. Are you listed as a beneficiary Is your spouse listed as a bene Do you and your spouse file your spouse file a state in Do you provide support to OR coverage or premium payment financial payments or assistant Do you have any bills that are Do you and your spouse have	, vacation, or socialize with each other? cain ANY joint bank or financial accounts any credit cards, retirement, or investment on any insurance policy or financial accordiciary on any insurance policy or financial accordiciary on any insurance policy or financial accordiciary on any insurance policy or financial accordicates on any insurance according to the process of the proc	ent accounts or other lines ount owned by your spouse ial account owned by you? sple? tax filed? y form including but not limity payments, car payments imony or child support.) ames? (Utility, Water, Cablich are jointly titled?	ited to: Insurance s, or any other form of e, Telephone, Cell, etc.)	YES	NO
Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint Do you and your spouse have. Are you listed as a beneficiary Is your spouse listed as a bene Do you and your spouse file your spouse file a state in Do you provide support to OR coverage or premium payment financial payments or assistant Do you have any bills that are Do you and your spouse have	, vacation, or socialize with each other? cain ANY joint bank or financial accounts any credit cards, retirement, or investment on any insurance policy or financial accordiciary on any insurance policy or financial accordiciary on any insurance policy or financial ur IRS return jointly or as a married councome tax? If so, in what name(s) is the receive support from your spouse in any ts, mortgage assistance or payment, util ce? (DO NOT INCLUDE court ordered align your spouse's name or in both your nany automobiles, boats, or aircrafts which	ent accounts or other lines ount owned by your spouse ial account owned by you? sple? tax filed? y form including but not limity payments, car payments imony or child support.) ames? (Utility, Water, Cablich are jointly titled?	ited to: Insurance s, or any other form of e, Telephone, Cell, etc.)	YES	NO
Do you and your spouse spend Do you and your spouse travel Do you and your spouse maint Do you and your spouse have Are you listed as a beneficiary Is your spouse listed as a bene Do you and your spouse file your spouse file a state in Do you provide support to OR coverage or premium paymen financial payments or assistant Do you have any bills that are Do you and your spouse have	, vacation, or socialize with each other? cain ANY joint bank or financial accounts any credit cards, retirement, or investment on any insurance policy or financial accordiciary on any insurance policy or financial accordiciary on any insurance policy or financial ur IRS return jointly or as a married councome tax? If so, in what name(s) is the receive support from your spouse in any ts, mortgage assistance or payment, util ce? (DO NOT INCLUDE court ordered align your spouse's name or in both your nany automobiles, boats, or aircrafts which	ent accounts or other lines ount owned by your spouse ial account owned by you? sple? tax filed? y form including but not limity payments, car payments imony or child support.) ames? (Utility, Water, Cablich are jointly titled?	ited to: Insurance s, or any other form of e, Telephone, Cell, etc.)	YES	NO

In the future, if your spouse is awarded a homestead exemption you must notify our office immediately so your Affidavit of Separation/Homestead Exemption can be reviewed.

AFFIDAVIT OF SEPARATION – PAGE 2 of 2

The following documents are required:

- IRS TAX RETURN OR NON FILING IRS AFFIDAVIT showing each spouse files their taxes separately and that there is no co-mingling of funds.
- 2. AT LEAST ONE UTILITY BILL (ELECTRIC, CABLE, TELEPHONE) showing the utility is in the applicant's name ONLY.
- CHECKING AND SAVINGS ACCOUNT STATEMENTS showing the applicant has these accounts in the applicant's name ONLY.

In addition, the applicant must provide any two of the following:

- 1. MORTGAGE STATEMENT & PAYMENT showing the applicant is solely responsible for the mortgage.
- 2. **CREDIT CARD BILLS** showing the applicant does not share accounts with spouse.
- 3. **HOMEOWNERS INS BILL & PAYMENT** showing the applicant is solely responsible for the insurance.
- 4. PROOF OF PAYMENT OF PROPERTY TAXES showing the applicant is solely responsible for the taxes.
- 5. **BENEFICIARY DESIGNATION FORMS** for any of the following accounts: Retirement, Pension, Life Insurance, Annuity, Brokerage, and Mutual Funds

I understand that separate family units must have been established on or before January 1 of the effective year of the exemption and the burden of demonstrating that we have established separate "family units" is my responsibility.

I understand that I will attest to this **each year** and provide evidence of separate family residential units and that if my/our living arrangements were to change, I will notify the Polk County Property Appraiser immediately so my records may be reviewed and any changes made to the status of my homestead.

I understand that section 196.131(2), Florida Statutes, provides that any person who knowingly and willfully gives false information for the purpose of claiming homestead exemption is guilty of a misdemeanor of the first degree, punishable by a term of imprisonment not exceeding 1 year or a fine not exceeding \$5,000 or both.

Under penalty of perjury, I hereby swear or affirm that the above is true and correct and I make this statement of my own free will.

	Signature of Applicant		
	Print Name		
	Address of Applicant		
	City, State and Zip Code		
STATE OF FLORIDA COUNTY OF POLK The foregoing instrument was acknowledged before me this	day of	vear	
by			
	Signature of Notary Public		
	Commissioned Name of Notary Public		
Personally Known OR Produced Identification			
Type of Identification Produced			
Commission Number:			

Please complete this form and email to <u>paexemptions@polk-county.net</u> - **OR** - mail to the Bartow Office address below.

NOTE: If you are separated, your exemption may not be approved without the submission of this form and the necessary documentation to establish separate family units. Thank you.