



SENIOR CITIZEN DISCOUNT APPLICATION

(Applicant must be 65 years of age or older with a gross household income of \$35,000 or less per year and must be served by MSD sewers)

Date: ___/___/___

LWC Bill Account Number: _____ (Attach copy of LWC bill)

(Please print)

Name of Applicant: _____ Single Married Widowed

Service Address: _____ (Street) (City) (State) (Zip)

Resident telephone number: () - _____ Date of Birth: ___/___/___

Please submit one document for each of the categories listed below and indicate which document you are providing. Proof of Household Income, Proof of Residency, Proof of Age. Includes sub-categories like IRS Tax Return, Deed/Title, Drivers License, etc.

*Tax Return and Schedules filed within the last 12 months. Gross household income must be \$35,000 or less.

I hereby apply for a 30% Senior Citizen Discount of the amount billed for sanitary sewer service and the EPA Consent Decree Surcharge for the service address listed above. I certify that I am the legal title/leaseholder/renter of the above property, that I am 65 years of age or older, that my gross household income is \$35,000 or less per year and that I have provided all relevant documents relating to my income, age and residency. I also understand that at MSD's discretion, I may be required to renew this application each year.

Executed this _____ day of _____, 20__

Signature of Applicant: _____

Please mail application and supporting documents to the following address:

MSD
Attn: Senior Citizen Discount Program
700 W. Liberty Street
Louisville, KY 40203

EXPLANATION

To apply for the homestead exemption, this application-affidavit must be submitted during the year in which exemption is sought for residential property located in Jefferson County to the Jefferson County Property Valuation Administrator's Office (JCPVA). Once approved, annual reapplication is not required.

Applicants seeking the homestead exemption under the disability provision must file this application-affidavit by December 31st of the year in which exemption is sought. **Under KRS 132.810(4)(b) applicants are required to report any change in their disability classification to the JCPVA. Failure to do so could result in delinquent tax liabilities for any years an applicant did not legally qualify for the exemption.**

What does *homestead exemption* mean?

Under the provisions of the Homestead Amendment, a person or persons must be 65 years of age or older or totally disabled during the year for which application is made, and must own, occupy and maintain a residential unit for such exemption. Only 1 exemption per residence is allowed. Applicants must not have applied for nor received a homestead exemption on any other property they may own in Kentucky or any other state other than their primary legal residence for which application is made.

Age Requirement

A person or persons owning, living in and maintaining a residential unit must meet the 65 years of age requirement. If only one spouse is 65, the age requirement is met.

Verification of Age & Jefferson County Residence

A person must own and occupy the property for which exemption is sought as his or her **Primary Residence**. A Primary Residence is a person's fixed permanent or principal home for legal, voting and tax purposes. Date of birth of the applicant(s) and proof of Jefferson County residence can be verified by submitting a copy of one of the following forms of identification:

1. **Valid Jefferson County Driver's License** issued by the Jefferson County Circuit Court Clerk's Office.
2. **Valid Personal ID Card** issued by the Jefferson County Circuit Court Clerk's Office. The address shown on the card must match the address of residence for which application is made.

If obtaining one of the above forms of identification presents an undue hardship for an applicant due to disability and/or advanced age, please contact the Jefferson County PVA's Homestead Department at 574-6380, option 3 to obtain secondary sources of age and residence verification.

Disability Requirements

A person must be classified as totally disabled under a program authorized or administered by an agency of the United States government or by any retirement system either within or without the Commonwealth of Kentucky. Applicants must document their disability with a copy of their award letter from their retirement system that declares the date they became eligible for disability benefits. Applicants must also document their date of birth and primary residence for which application is made. To be eligible, applicants must have maintained their disability classification and received disability payments under such classification for the entire year.

KRS 132.810(2) (h) provides, "When title to property which is exempted, either in whole or in part, under the homestead exemption is transferred, the owner, administrator, executor, trustee, guardian, conservator, curator or agent shall report such transfer to the property valuation administrator."

Fraudulent Misrepresentations

Under the provisions of KRS 132.990(1), "Any person who willfully fails to supply the property valuation administrator or the Department of Revenue with a complete list of his property and such facts with regard thereto as may be required or who violates any of the provisions of KRS 132.570 shall be fined not more than five hundred dollars (\$500)."