

## Property Tax Relief Checklist

**The following Checklist will help provide guidance on the documents needed to meet the requirements for the Property Tax Relief programs per N.C.G.S.**

**New Applicants:** The *application* and income information are due to our office no later than June 1<sup>st</sup> of the current year.

**Audit Applicants:** The *questionnaire* and income information are due to our office no later than March 1<sup>th</sup> of the current year.

**Elderly/ Totally & Permanently Disabled Exclusion Requirements:**

- First page** of your individual Federal Income Tax Return for the previous calendar year.
  - a. Married applicants file separate returns must submit both Federal Income Tax returns for the previous year.
- Certificate of Disability** (for applicants under 65 years of age as of January 1<sup>st</sup>)
- Copy** of W-2
- Copy** of 1099 forms for Interest (Taxable & Tax Exempt)
- Copy** of 1099 forms for Dividends
- Copy** of 1099 forms for Capital Gains
- Copy** of 1099 forms for all IRA distributions
- Copy** of 1099 forms for all Pension and Annuities
- Copy** of 1099 forms for Social Security Benefits
- Copy** of any of financial institution Statements
- Report** State and/or Federal income tax refunds received in prior year
- Completed and signed** application or questionnaire

**Circuit Breaker Deferment Requirement:**

- Certificate of Disability** (for applicants under 65 years of age as of January 1<sup>st</sup>)
- First page** of your individual Federal Income Tax Return for the previous calendar year.
  - a. Married applicants file separate returns must submit both Federal Income Tax returns for the previous year.
- Copy** of W-2
- Copy** of 1099 forms for Interest (Taxable & Tax Exempt)
- Copy** of 1099 forms for Dividends
- Copy** of 1099 forms for Capital Gains
- Copy** of 1099 forms for all IRA distributions
- Copy** of 1099 forms for all Pension and Annuities
- Copy** of 1099 forms for Social Security Benefits
- Copy** of any of financial institution Statements
- Report** State and/or Federal income tax refunds received in prior year
- Completed and signed** application

**Disabled Veteran Exclusion Requirements:**

- Certification of Veteran's Property Tax Exclusion** (For either the Veteran or Surviving Spouse)
- Completed and signed** application

**Wilson County Tax Contact Information:**

**Mail to:** Wilson County Tax Department, PO Box 2106, Wilson, NC 27894-2106

**Email to:** [taxoffice@wilsoncountync.gov](mailto:taxoffice@wilsoncountync.gov)

**In Person:** 113 E. Nash St, Wilson, NC 27893 - 8:00 AM-5:00 PM, Monday - Friday

For more information, please reach out to our office at 252-399-2900, Opt. 4.