Dear Property Owner:

**Per NUSD Board Policy 3210 – Parcel Tax**, Novato property owners, **age 65 or older**, qualify for a Senior Parcel Tax Exemption provided the property is the applicant’s legal, principal residence in which they currently live.

As requested, the senior exemption application form is enclosed. **Please complete and sign** the application and return it to our office with the following information:

1. **Current Property Tax Bill (COPY)**
2. **Proof of Birth Date** (i.e. COPY of driver’s license, state identification card, passport or birth certificate).
3. **Proof of Residence (COPY)**
   If your identification contains an address other than that for which you are requesting exemption, please submit a **copy** of a utility bill that includes your name, the physical address of the property, and dated within six months of the application date (i.e.: electric, water, garbage, cable, home phone, current homeowner insurance document, etc.).
4. **Pages from Trust Instrument (if applicable) (COPY)**
   If ownership of your home is held under a trust instrument (TR) please submit a copy of the following pages:
   - First Page
   - The Page that names applicant as **Beneficiary of the Trust** or the page that states the trust is to be applied for applicant’s benefit
   - Signature Page
   - Property Description Page, within trust (Exhibit/Schedule), referencing the parcel /lot number for applicant’s property or property address

If you have questions, or need assistance, please contact Kathy Potter: **415-493-4257** or **kpotter@nusd.org**

**Return complete, signed application and required documents by any of the following methods:**

**Fax:** 415-898-5790  
**Email:** kpotter@nusd.org

**Mail:** Novato Unified School District  
**ATTN: Senior Exemptions**  
1015 Seventh Street  
Novato, CA 94945

**IMPORTANT NOTIFICATIONS:**

- All timelines and procedures for establishing an exemption must be strictly observed; retroactive exemption requests will not be recognized or awarded.
- **No refunds** will be made of taxes paid on property for which the property owner did not establish a timely exemption.
- Refund requests, except provided above, shall be determined by the District or County of Marin as applicable.
- Once approved, NUSD notifies the Marin County Department of Finance; applicants are notified of approval via mail.
- Approved senior exemptions are continuous as long as applicants remain eligible; applicants are not required to re-apply each year.
APPLICATION FOR PARCEL TAX SENIOR EXEMPTION

** Applications MUST be submitted no later than December 31 of the current tax year **

(please submit your application as early as possible to prevent delays in processing)

Qualification requirements for a Parcel Tax Senior Exemption on a single-family residence during any tax year (July 1-June 30):

1. Applicant is age 65 before December 31st of the qualifying tax year
2. Applicant is the beneficial owner* or owner of record for parcel
3. Parcel is applicant’s principal residence

To apply for the Parcel Tax Senior Exemption, please complete and sign this form and return it with the required paperwork (see enclosed information letter):

Fax: 415-898-5790

Email: kpotter@nusd.org

Mail: Novato Unified School District
ATTN: Senior Exemptions
1015 Seventh Street
Novato, CA 94945

★ For assistance, please contact Kathy Potter
415-493-4257 or kpotter@nusd.org

APPLICANT’S NAME (please print):

PARCEL ADDRESS:

Is this address your principal place of residence? [ ] YES [ ] NO

Mailing Address

City

State

Zip

Birth Date

Parcel Number

Daytime Phone

E-Mail Address

I claim the parcel tax senior exemption as:

[ ] a) Owner of Record

[ ] b) A beneficial owner under a trust instrument

[ ] c) Other (please state) _______________________

If you checked (b) or (c) above please provide a copy of the instrument or document under which you claim beneficial ownership (see enclosed information letter for required documents). Beneficial ownership indicates that you have title in your name, or a trustee, or other fiduciary who acts on your behalf, may hold title for your benefit, such as a partner, a corporation, a lessor, an obligee under contract of sale, etc.

I declare under penalty of perjury that the foregoing is true and correct,

Applicant Signature: ___________________________ Date: _______________________

City: ___________________________ County: ___________________________, California

NOTE:

Approved Parcel Tax Senior Exemptions are continuous as long as applicants remain eligible; applicants are not required to re-apply each year.