



## ROSS School District

A California  
Distinguished  
School

*We are an  
exceptional learning  
community that  
connects children  
to the world by  
keeping their hearts,  
minds and actions  
at the center  
of all we do.*

Dear Property Owner:

Please find enclosed the application for senior exemption of the Ross School District parcel tax charge. Property owners, age 65 and older, qualify for a Senior Parcel Tax Exemption provided the property is the applicant's legal, principal residence in which they currently live.

Please complete the application form and return the signed document to our office along with the following information:

**1. Proof of Your Birth Date (COPY)**

Driver's license, state identification card, passport or birth certificate

**2. Proof of Residence (COPY)**

PG&E or water district bill, dated within the last 6 months, that includes your name and physical address of the property

**3. Pages from Trust Instrument (COPY)**

If ownership of your home is held under a trust instrument (TR), please submit copies of all of the following pages of the trust:

- First page
- Page that names applicant as Beneficiary of the Trust or the page that states the trust is to be applied for the applicant's benefit
- Signature page
- Property description page, within trust (Exhibit/Schedule A), referencing the parcel/lot number or property address

If you have any questions, please call the District Office at 415-457-2705 x. 210.

### BOARD OF TRUSTEES

Jeff Bergholt

Chris Ericksen

Josh Fisher

Megan Pavelka

Stephanie Robinson

**Please complete and return this form with the applicable documents by any of the following methods:**

**Mail:** Ross School District  
ATT: Senior Exemptions  
PO Box 1058  
Ross, CA 94957

**Email:** Jean Samolis:  
jsamolis@rossbears.org

**Fax:** 415-457-8923

### Important Notifications—

- All timelines and procedures for establishing an exemption must be strictly observed; retroactive exemption requests will not be recognized or awarded.
- Once approved, Ross School District notifies the Marin County Department of Finance; applicants are notified by email.
- Each exemption shall continue for each year the applicant remains eligible, without the need for annual reapplication.

P.O. Box 1058  
9 Lagunitas Rd.  
Ross, CA 94957  
(415) 457-2705  
fax (415) 457-8923  
www.rossbears.org

**ROSS SCHOOL DISTRICT**

Mailing Address:

P.O. Box 1058

Ross, CA 94957

**APPLICATION FOR PARCEL TAX SENIOR EXEMPTION**

To qualify for exemption for your parcel during any tax year (July 1- June 30), you must have attained age 65 prior to September 1 of any applicable year, be a beneficial owner\* of the parcel and use the parcel as your principal place of residence. If you believe you will qualify for this exemption, please complete and return this form to the Ross School District (see address above) **no later than September 1** of the year it is to take effect thereafter during the Special Assessment period.

APPLICANT NAME(S): \_\_\_\_\_

ADDRESS: \_\_\_\_\_ CITY: \_\_\_\_\_

PO BOX #: \_\_\_\_\_ ASSESSOR'S PARCEL NUMBER (APN): \_\_\_\_\_

Is the Address Your Principal Place of Residence?      YES \_\_\_\_\_ NO \_\_\_\_\_

DATE OF BIRTH: \_\_\_\_\_ DATE OF BIRTH: \_\_\_\_\_

EMAIL ADDRESS: \_\_\_\_\_ PHONE: \_\_\_\_\_

DO YOU CLAIM THE 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 Owner" means that you have title in your name, or title may be held for your benefit by a trustee or other fiduciary who acts on your behalf, such as a partner, corporation, lessor, obligee under a contract of sale, etc.*

Executed on \_\_\_\_\_, 20\_\_\_\_, at \_\_\_\_\_, California.

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

\_\_\_\_\_  
Applicant Signature

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This space for Ross School District only.

Approved       Denied      Date Property Owner Notified: \_\_\_\_\_

\_\_\_\_\_  
School District Authorized Signature