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.

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

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

**Email:** 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 telephone.
- Each exemption shall continue for each year the applicant remains eligible, without the need for annual reapplication.
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

This space for Ross School District only.

☐ Approved    ☐ Denied          Date Property Owner Notified: ___________________

________________________________
School District Authorized Signature