



Administrative Office  
411 Sycamore Avenue  
Mill Valley, CA 94941  
Tel (415) 389-7700  
Fax (415) 389-7773

Dear Property Owner:

Enclosed is your application for a senior citizen exemption from the Mill Valley School District Parcel Assessment on your property tax bill. Please complete and sign the form (verifying the information is correct), and return the signed application along with the following documents:

- 1) Proof of your birth date – (i.e., copy of your driver's license, state identification card or passport.)
- 2) Proof of your Mill Valley residency in the form of:
  - Current Property tax bill for the residence for which you are claiming an exemption and which indicates evidence of the **Homeowners Exemption**.

**AND**

- **One of the following items listed below:**

- ✓ PG&E
- ✓ Marin Municipal Water District
- ✓ Mill Valley Refuse Bill / Tam Valley Community Services District / or other local refuse agency serving residences within district boundaries
- ✓ Comcast (cable TV) / Direct TV
- ✓ Land line telephone (cell and long-distance service not accepted)
- ✓ Recent homeowner's insurance document.

- 3) Pages from Trust Instrument (COPY) – If ownership of your home is held under a trust instrument (TR), please submit a copy of the following pages:

- First Page
- Signature Page
- Property Description: Page within your trust (Exhibit/Schedule) that references the parcel number, lot numbers for your property, or property address.

Upon receipt and verification of your information, I will notify the County Auditor to adjust the Mill Valley parcel tax assessment off your property tax bill. **Your exemption will remain in effect for future years unless your primary residence changes.**

If you have any questions, please feel free to call me at 389-7753.

Thank you,

Monica Wallace  
Executive Assistant

## Mill Valley School District

Mailing Address:

411 Sycamore Ave, Mill Valley, CA 94941  
389-7753

District Office is located at:

Mill Valley Middle School, Corner of Sycamore Ave and Camino Alto

### APPLICATION FOR SENIOR EXEMPTION OF PARCEL ASSESSMENT #'S 107293 107294

Mail To:

Requirements for an exemption are as follows:

- Mill Valley School Assessment (107293) – the property owner must reach the age of 65 before July 1 of any given year, be an owner of record, and use the parcel as his or her principal place of residence.
- Mill Valley School Special Tax (107294) – the property owner must reach the age of 65 before January 1 of any given year, be an owner of record, and use the parcel as his or her principal place of residence.

Please submit application to the District by May 1, however we do process exemptions periodically during the tax year. We cannot reimburse for past years.

The exemption shall continue for each year the applicant remains eligible during the assessment period (July 1, 1998 through June 30, 2029) without the need for annual reapplication.

Parcel Number:

Address:

Is the Address Your Principal Place of Residence: Yes \_\_\_\_\_ No \_\_\_\_\_

Birthdate(s): \_\_\_\_\_

*Of above registered owners, regardless of age*

#### DO YOU CLAIM THE EXEMPTION AS:

- a) \_\_\_\_\_ Owner of record
- b) \_\_\_\_\_ A beneficial owner\* under a trust instrument
- c) \_\_\_\_\_ Other (please state)

*\*If you check (b) or (c) above, please provide a copy of the instrument or document under which you claim beneficial ownership – see enclosed information letter for requested pages. A beneficial owner means 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, oblige under a contract of sale etc.*

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

\_\_\_\_\_  
Signature

\_\_\_\_\_  
Signature

Phone \_\_\_\_\_

E-mail \_\_\_\_\_

Date: \_\_\_\_\_

**If you have any questions, or need any assistance in completing this form, call 389-7753**

THIS SPACE FOR MILL VALLEY SCHOOL DISTRICT ONLY

\_\_\_\_\_ Request Approved

Date County Auditor Notified: \_\_\_\_\_

\_\_\_\_\_ Request Denied

\_\_\_\_\_ Confirmation Sent

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