

Tax Exemptions

VALTA Presentation

Tim Tangen Jr.

Justin Nejad



Agenda

1. Introduction

2. Online
Application

3. Application
Review Process

4. HB 957

5. Q & A

Online Application

■ Benefits

- Ease of access
- ADA Compliance
- Electronic signature
- Retention of documents
- Improvement of service
- Automatic email confirmation

■ Drawbacks

- System compatibility
- Cost
- Unfamiliar audience



Online Application - Video



DocuSign

BEGIN SIGNING ? HELP

PowerForm Signer Information

Please complete this application and furnish all the required documentation to apply for property tax exemption in Fairfax County. Each signer will receive an email requiring them to sign this document before it is forwarded to Department of Tax Administration. If the application is not completed and signed, it will expire in 14 days.

Please enter your name and email to begin the signing process.

Applicant (Disabled Veteran or Surviving Spouse)

Your Name: *

Full Name

Your Email: *

Email Address

Windows taskbar: Type here to search, 59°F Sunny, 8:58 AM 5/26/2023

Exemption Admin Screen

DocuSign eSignature

HomeManageTemplatesReports

SHARED ACCESS ▾

NEW ▾

ENVELOPES

Inbox

Sent

Drafts

Deleted

Bulk Send

PowerForms

QUICK VIEWS

Action Required

Waiting for Others

Expiring Soon

Completed

Inbox

Filtered by: Date (Last 6 Months) | Edit

Q Search Inbox and Folders

FILTERS

☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 21 21:27	DOWNLOAD ▾
☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 21 15:08	DOWNLOAD ▾
☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 19 17:02	DOWNLOAD ▾
☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 19 11:49	DOWNLOAD ▾
☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 18 10:02	DOWNLOAD ▾
☐	✓	Please DocuSign: Disabled Veteran Tax Exemption Application From: Tax Relief Section	Completed	2023 May 18 08:32	DOWNLOAD ▾



Please DocuSign: Disabled Veteran Tax Exemption Application ⓘ

Envelope ID

From: Tax Relief Section

Last change on 2023 May 5 | 15:45

Sent on 2023 April 28 | 18:00

✓ Completed

MOVE

MORE ▾

Recipients

SIGNING ORDER

- 1

✓

Private Message:

Hello, This email is to inform you that your spouse listed you on their disabled veteran tax exemption application. You must sign the application before it is forwarded to the Department of Tax Administration. If you have any questions, please discuss this matter with your spouse before completing the form. Thank you, Department of Tax Administration

Signed

on 2023 April 28 | 18:26

Signed in location
- 2

✓

Private Message:

Hello, This email is to inform you that your spouse listed you on their disabled veteran tax exemption application. You must sign the application before it is forwarded to the Department of Tax Administration. If you have any questions, please discuss this matter with your spouse before completing the form. Thank you, Department of Tax Administration

Signed

on 2023 May 5 | 15:45

Signed in location
- 3

✓

Tax Exemption Disabled Veteran Application

Timothy.Tangen@Fairfaxcounty.gov

Signing Group

CC Copy Received

Sent on 2023 May 5 | 15:45

Message

Hello, This message is regarding the online Fairfax County tax exemption application for a disabled veteran or surviving spouse of a disabled veteran. Completed applications are forwarded to our office via DocuSign and send to you via email for your records. The review process takes four to six weeks once the completed application is received. We appreciate your patience, Department of Tax Administration

Download

Select which files you want to download:

- ☒ All 6 files
- ☒ Document 5 PDFs
- ☒ Certificate of Completion 1 PDF

☐ Combine all PDFs into one file

DOWNLOAD

CANCEL

Veteran_Exem...

Pages: 3



1 of 3

Benefit Summ...

Pages: 2



1 of 2

Pages: 1



1

Virginia Depart...

Pages: 2



Exemption Application Review Process



- IRMS
- Accurint
- Real Estate System of Records
- Courts Public Records
- Personal Property System of Records
- DMV
- BrightMLS
- Other localities and states public records
(assessment and court records)

A closer look



Form 1040 Department of the Treasury—Internal Revenue Service **2022** OMB No. 1545-0074 IRS Use Only—Do not write or staple in this space.

Filing Status Check only one box.
☐ Single ☐ Married filing jointly ☐ Married filing separately (MFS) ☐ Head of household (HOH) ☐ Qualifying surviving spouse (QSS)
 If you checked the MFS box, enter the name of your spouse. If you checked the HOH or QSS box, enter the child's name if the qualifying person is a child but not your dependent.

Your first name and middle initial _____ Last name _____ Your social security number _____
 If joint return, spouse's first name and middle initial _____ Last name _____ Spouse's social security number _____

Home address (number and street). If you have a P.O. box, see instructions. _____ Apt. no. _____
 City, town, or post office. If you have a foreign address, also complete spaces below. _____ State _____ ZIP code _____
 Foreign country name _____ Foreign province/state/country _____ Foreign postal code _____
☐ You ☐ Spouse

Digital Assets At any time during 2022, did you: (a) receive (as a reward, award, or payment for property or services); or (b) sell, exchange, gift, or otherwise dispose of a digital asset (or a financial interest in a digital asset)? (See instructions.) ☐ Yes ☐ No

Standard Deduction Someone can claim: ☐ You as a dependent ☐ Your spouse as a dependent
☐ Spouse itemizes on a separate return or you were a dual-status alien

Age/Blindness You: ☐ Were born before January 2, 1958 ☐ Are blind Spouse: ☐ Was born before January 2, 1958 ☐ Is blind

Dependents (see instructions):
 If more than four dependents, see instructions and check here ☐

(1) First name	Last name	(2) Social security number	(3) Relationship to you	(4) Check the box if qualifies for (see instructions):	Child tax credit	Credit for other dependents
					☐	☐
					☐	☐
					☐	☐
					☐	☐

Income
 Attach Form(s) W-2 here. Also attach Forms W-2G and 1099-R if tax was withheld. If you did not get a Form W-2, see instructions.

1a Total amount from Form(s) W-2, box 1 (see instructions)		1a	
b Household employee wages not reported on Form(s) W-2		1b	
c Tip income not reported on line 1a (see instructions)		1c	
d Medicaid waiver payments not reported on Form(s) W-2 (see instructions)		1d	
e Taxable dependent care benefits from Form 2441, line 26		1e	
f Employer-provided adoption benefits from Form 8839, line 29		1f	
g Wages from Form 8919, line 6		1g	
h Other earned income (see instructions)		1h	
i Nontaxable combat pay election (see instructions)		1i	
z Add lines 1a through 1h		1z	

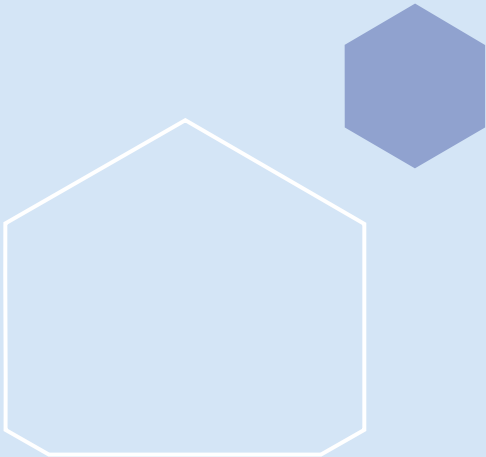
Attach Sch. B if required.

2a Tax-exempt interest	2a		b Taxable interest	2b	
3a Qualified dividends	3a		b Ordinary dividends	3b	
4a IRA distributions	4a		b Taxable amount	4b	
5a Pensions and annuities	5a		b Taxable amount	5b	
6a Social security benefits	6a		b Taxable amount	6b	
c If you elect to use the lump-sum election method, check here (see instructions)					
7 Capital gain or (loss). Attach Schedule D if required. If not required, check here				7	
8 Other income from Schedule 1, line 10				8	
9 Add lines 1z, 2b, 3b, 4b, 5b, 6b, 7, and 8. This is your total income				9	
10 Adjustments to income from Schedule 1, line 26				10	
11 Subtract line 10 from line 9. This is your adjusted gross income				11	
12 Standard deduction or itemized deductions (from Schedule A)				12	
13 Qualified business income deduction from Form 8995 or Form 8995-A				13	
14 Add lines 12 and 13				14	
15 Subtract line 14 from line 11. If zero or less, enter -0-. This is your taxable income				15	

Standard Deduction for—
 • Single or Married filing separately, \$12,950
 • Married filing jointly or Qualifying surviving spouse, \$25,900
 • Head of household, \$19,400
 • If you checked any box under Standard Deduction, see instructions.

For Disclosure, Privacy Act, and Paperwork Reduction Act Notice, see separate instructions. Cat. No. 11320B Form **1040** (2022)

Why would we ask for a closing document?



ALTA Settlement Statement

American Land Title Association	ALTA Settlement Statement - Combined Adopted 05-01-2015
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File No./Escrow No.:	Title Company Name	Title Company
Print Date & Time:	ALTA Universal ID	Logo
Officer/Escrow Officer:	Title Company Address	
Settlement Location:		

Property Address:
Buyer:
Seller:
Lender:

Settlement Date:
Disbursement Date:
Additional dates per state requirements:

Seller		Description	Borrower/Buyer	
Debit	Credit		Debit	Credit
		Financial		
		Sales Price of Property		
		Personal Property		
		Deposit including earnest money		
		Loan Amount		
		Existing Loan(s) Assumed or Taken Subject to _____		
		Seller Credit		
		Excess Deposit		
		Prorations/Adjustments		
		School Taxes from (date) to (date)		
		County Taxes from (date) to (date)		
		HOA dues from (date) to (date)		
		Seller Credit		
		Loan Charges to (lender co.)		
		Points		
		Application Fee		
		Origination Fee		
		Underwriting Fee		
		Mortgage Insurance Premium		
		Prepaid Interest		

House Bill 957



Property Reclassification



Line of Duty Determination



Criminal in Nature



Q & A

Thank you