

# Application for Owner Occupied Homestead Classification

Please read the back of this form before completing. You must own and occupy the property on either January 2 or December 1, and the application must be returned to your assessor's office by December 15 to be eligible for homestead classification for taxes payable in the following year. Failure to fully complete the application may result in a fractional homestead or denial of the homestead classification on the property described in Section 1.

**Making false statements on this application is against the law.** Minnesota Statutes, section 609.41 states that anyone giving false information in order to avoid or reduce their tax obligations is subject to a fine of up to \$3,000 and/or up to one year in prison.

**Section 1 - Property information**

*This section is to be completed by all applicants. Please provide the following information pertaining to the property you own and on which you are claiming homestead.*

Property address \_\_\_\_\_ Is this also your mailing address?  Yes  No

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Parcel ID or legal description of all property on which homestead is being claimed (if you need more space, please attach a separate sheet of paper): \_\_\_\_\_

Date owned by applicant \_\_\_\_/\_\_\_\_/\_\_\_\_ Date occupied by applicant \_\_\_\_/\_\_\_\_/\_\_\_\_ Is this property adjacent to another property you own that is currently receiving homestead?  Yes  No

**Section 2 - Previous residence**

*This section is to be completed by all applicants. Please provide the following information pertaining to your previous residence.*

Previous address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_ County \_\_\_\_\_

Date vacated \_\_\_\_/\_\_\_\_/\_\_\_\_ Was the property classified as homestead?  Yes  No

**Section 3 - Applicant(s) claiming homestead on property**

*This section is to be completed by applicant(s) claiming homestead on the property. Each applicant must print his/her name and Social Security number below, answer the questions, sign, and date the application. By signing below, I certify that the information on this form is true and correct to the best of my knowledge. I also certify that I am a Minnesota resident, and I occupy the property described in Section 1 as my primary place of residence.*

**Occupant 1** Last name \_\_\_\_\_ First name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Social Security number \_\_\_\_\_

Are you listed as an owner on the deed?  Yes  No

What is your marital status?  single  married  divorced  legally separated **If married**, does your spouse occupy the property?  Yes  No

Signature (Occupant 1) \_\_\_\_\_ Date \_\_\_\_\_ Daytime phone number \_\_\_\_\_

**Occupant 2** Last name \_\_\_\_\_ First name \_\_\_\_\_ Middle Initial \_\_\_\_\_ Social Security number \_\_\_\_\_

Are you listed as an owner on the deed?  Yes  No

What is your marital status?  single  married  divorced  legally separated **If married**, does your spouse occupy the property?  Yes  No

Signature (Occupant 2) \_\_\_\_\_ Date \_\_\_\_\_ Daytime phone number \_\_\_\_\_

**Section 4 - Additional Information**

*This section is to be completed by all applicants. Please answer the questions below.*

Are all owners who are listed on the deed claiming homestead?  Yes  No **If no**, please provide the name, address, and daytime phone number for each owner who does not occupy the property (on a separate sheet of paper).

Was a relative required to be listed on the deed to this property by the terms of the financing agreement?  Yes  No **If yes**, are you a first-time home buyer, including previously married persons purchasing a home as a single individual for the first time?  Yes  No **If yes**, please complete Addendum to Application for Homestead Classification.

# Applying for the owner occupied homestead classification

## How to apply

To apply for the homestead classification for your residence, you must fill out this application. To qualify for the homestead classification, you must: (All three must apply.)

1. Be one of the owners of the property listed on this application.
2. Occupy the property listed on this application as your primary residence.
3. Be a Minnesota resident.

Your county assessor will determine if you are a Minnesota resident for homestead purposes. Some of the conditions that may be used to determine your residency status include:

- Are you registered to vote in Minnesota?
- Do you have a valid Minnesota driver's license?
- Do you file a Minnesota income tax return?
- Do you list property in Minnesota as your permanent mailing address?
- Do your children, if any, attend school in Minnesota?
- Are you a resident of any other state or country?

## Application deadline

The homestead application must be turned into the county assessor's office by December 15 to be eligible for the homestead classification for taxes payable in the following year.

## Required information

Minnesota Statutes, section 273.124, subdivision 13 requires Social Security numbers and signatures of **all owners occupying the property and each owner's spouse that occupies the property** to be listed on this application.

Additionally, each owner's spouse who occupies the property also must be listed on the homestead application even if the owner's spouse is not listed as an owner on the deed of record.

If there is not enough space on the application for all required signatures and Social Security numbers, please use an extra sheet and include it with the application.

## How we use information

The Social Security numbers or affidavits or other proofs of property owners and spouses are private data. Minnesota Statutes, section 273.124, subdivision 13, authorizes the collection of Social Security numbers and signatures of all applicants, including spouses, on homestead applications.

The county assessor may share the information contained on this form with the county auditor, county treasurer, county attorney, Commissioner of Revenue, or other federal, state or local taxing authorities to verify your compliance with this and other tax programs.

You can refuse to provide the information on this form. However, failure to provide this information may result in a fractional homestead or denial of the homestead classification.

## Penalties

**Making false statements on this application is against the law.** Minnesota Statutes, section 609.41 states that anyone giving false information in order to avoid or reduce their tax obligations is subject to a fine of up to \$3,000 and/or up to one year in prison.

In addition, the property owner may be required to pay all tax which is due on the property based on its correct property class, plus a penalty equal to the same amount. (Minnesota Statutes, section 273.124, subdivision 13, paragraph h)

## Renewing your homestead classification

If this property is granted the homestead classification, it is not necessary for you to reapply for the classification.

However, at any time, the county assessor may require you to provide an additional application or other proof deemed necessary to verify that you continue to qualify for the homestead classification.

## If you sell, move or change your marital status

If this property is sold, you or your spouse changes your primary residence, or you change your marital status, state law requires you to notify the county assessor within 30 days.

If you fail to notify the county assessor within 30 days of the change, the property may be assessed the tax that is due on the property based on its correct property class plus a penalty equal to the same amount.

Please return this application to: