



HEATHER OLIVER, TOWN CLERK

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**2026 Town of Colonial Beach Real Estate and Utility Discount Program Application
And
Instructions for Senior Citizens and People with Disabilities**

Please read over the application and instructions. You must complete the worksheets and sign page 6 before a Notary Public.

Upon completion, please mail or hand deliver all required documents to the Town Clerk's office before April 17, 2026. The Town Clerk will verify your documentation and approve it as appropriate.

Mailing Address

Town of Colonial Beach

Attn: Town Clerk

P.O. Box 450

Colonial Beach, VA 22443

GENERAL INFORMATION

Tax relief is granted on an annual basis and a renewal application must be filed each year. To apply, the applicant must be a resident of Town of Colonial Beach and be at least 65 years of age or permanently and totally disabled.

First-time applicants applying as permanently and totally disabled must provide certification and the date the disability began from one of the sources listed below:

- Veterans Administration or Railroad Retirement Board.
- Affidavit signed by two separate doctors who are either licensed to practice medicine in Virginia or are military officers on active duty who practice medicine with the United States Armed Forces. The affidavit forms are provided by the Tax Relief Office on request.
- Certification by the Social Security Administration, which states the date the applicant or relatives were deemed disabled (SSA Notice of Award).

This application must be filed no later than April 17, 2026. If hardship conditions exist which, through no fault of the applicant, prohibit them from applying by the due date, the due date may be extended. A letter of hardship with an explanation of the late filing must be provided with all applications submitted after the April 18th deadline for returning applicants.

The application may be submitted by mail or in-person. A letter confirming receipt of your application will be mailed within three weeks of receipt.

Tax Relief is not available to the executor of an estate or heirs of an applicant.

INSTRUCTIONS

1. Please complete this form with the same accuracy as you would your income tax return. You must meet all eligibility criteria to apply.
2. If you are not over 65 years of age, you must provide disability verification. This requirement does not apply to returning applicants who have provided the required disability documentation in a previous year.
3. Submit COPIES of supporting income and asset documentation as of December 31, 2025, with your initial filing. Incomplete applications will be denied.
4. Enclose a copy of the death certificate for any property co-owner who is deceased (unless previously supplied with a prior application).
5. Review the application to make sure all parts are complete and verify all supporting documents are included (if applicable).
6. Return the completed 2026 tax relief application and supporting documentation postmarked by April 17, 2026 (See above for filing due to hardship).

To qualify for tax relief, the applicant must provide all financial documents with their application at the time of submission. Incomplete applications will be denied.

QUALIFICATION FOR REAL ESTATE TAX RELIEF

Minimum Age or Disability - The applicant must be at least 65 years of age or permanently and totally disabled as of December 31, 2025.

Use/Occupancy - The property must be owned and occupied year-round except when the owner(s) temporarily reside(s) in a hospital or nursing home for physical or mental care. The dwelling may not be used or leased to others for consideration.

Account Status – The applicant’s current real estate tax amount, utility account and personal property tax payments must be current with no outstanding balance due and owing.

Net Worth* - In order to be eligible for the tax relief exemption, the net combined financial worth of the owner(s) and their spouse may not exceed \$100,000, excluding the value of the home, its furnishings, and up to five acres of the land upon which the home is located, subject to the condition that said land cannot be subdivided.

*Effective January 1, 2026

Gross Income*- In order to be eligible for the tax relief exemption, the annual gross income cannot exceed \$29,400. Annual gross income is computed by adding all the prior year’s income received by the owner.

*Effective January 1, 2026 (based of the Westmoreland County, VA HUD Very Low Income Limits)

Gross Combined Income* - In order to be eligible for the tax relief exemption, the annual combined gross income cannot exceed \$33,600. Annual combined gross income is computed by adding all the prior year’s income received by the owner(s), the owner’s spouse.

*Effective January 1, 2026 (based of the Westmoreland County, VA HUD Very Low Income Limits)

2026 APPLICANT INFORMATION

On December 31, 2025, I was Single Married Divorced Widowed

Name of Applicant:	DOB	SSN
Name of Spouse	DOB	SSN
Home Address		
Home Phone	Alternative Phone	Email
Are you and your spouse required to file federal income tax returns		YES NO
Returning Applicants Only: Are you submitting this application before the April 17 th deadline?		
<input type="checkbox"/> YES <input type="checkbox"/> No. I am applying after the deadline, and I will include a letter of hardship.		

PART 1 COMPLETE ALL PARTS FOR APPLICANT AND SPOUSE ONLY				
	2025 Gross Income	Required Documentation (IF APPLICABLE)	Applicant	Spouse
1	Salaries and Wages, Etc.	(W-2, 1099)		
2	Social Security Benefits	(1099-SSA)		
3	Veterans Benefits	(V.A. Benefit Letter)		
4	Pensions/Retirement	(1099-R)		
5	Interest & Dividend Income	(1099-INT/OID) & (1099-DIV)		
6	Other Public Assistance	(Proof of Benefits)		
7	All other Sources			
8	Total Gross Income Part 1 (Add lines 1 through 7)			

OFFICE USE ONLY

Parcel Number _____

Date Received _____

BE SURE TO COMPLETE ALL PARTS THAT APPLY AND INCLUDE PROOF OF ALL ASSETS

**PART 1 LIST REAL ESTATE OTHER THAN RESIDENCE
(INSIDE & OUTSIDE THE UNITED STATES)**

1	Address:	Market Value as of December 2025:
2	Address:	Market Value as of December 2025:

**PART 2 LIST PERSONAL PROPERTY ONLY
INCLUDE MOTOR VEHICLES, BOATS, and TRAILERS.**

3	Year:	Make:	Model:	Assessed Value as of 2025: <i>OFFICE USE ONLY</i>
4	Year:	Make:	Model:	Assessed Value as of 2025: <i>OFFICE USE ONLY</i>
5	Year:	Make:	Model:	Assessed Value as of 2025: <i>OFFICE USE ONLY</i>

PART 3 LIST CASH VALUE OF OTHER ASSETS AS OF DECEMBER 31, 2025

		Required Documentation (IF APPLICABLE)	Applicant	Spouse
1	Savings Account(s)	Complete Account Statements as of 12/31/2025		
2	Checking Account(s)			
3	Stocks and Bonds	1099-B		
4	Life Insurance and Annuity (Cash Value)	Financial Statement as of 12/31/2025		
5	Total Assets (Add lines 1 through 4)			
6	Debts Payable – Identify:			
7	Total Net (Subtract line 6 from 5)			

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This application is subject to audit for up to three years after the year filed. Any corrections will be made by the town during this period, which can change exemption amounts for prior years. Applicants will remain liable for all taxes until they are notified in writing by the Town of Colonial Beach.

RETAIN COPIES OF ALL PERTINENT RECORDS.

Attach a copy of supporting documentation of all income and assets referenced on your application with end of year statements as of December 31, 2025. Applications without supporting documentation will be denied.

STATE of VIRGINIA

THIS IS TO CERTIFY, that I understand I must file annually, that the total combined net worth and the total combined income from all sources does not exceed the limits as specified by the Town of Colonial Beach Ordinance and that changes with respect to income, financial worth, ownership of property or other factors occurring during the taxable year for which this affidavit is being filed may nullify any exemption for the current year and the taxable year immediately following and that a material misstatement to obtain tax relief shall be punished as a misdemeanor.

OATH, I, the undersigned applicant, do swear (or affirm) that the foregoing figures and statements are true, full and correct to the best of my knowledge and belief.

Signature of Applicant _____

Printed Name _____

County of Westmoreland

Commonwealth of Virginia

The foregoing instrument was acknowledged before me this ___ day of ___, 20 ___ by
_____ (Name of person seeking acknowledgment)

Notary Public's signature

Notary Seal Notary registration number: _____

My commission expires: _____

AUTHORIZATION FOR INVESTIGATION

I hereby give my consent and permission to any governmental agency, corporation, financial institution, retirement system or other source of income, to release to the Town Clerk of the Town of Colonial Beach, Virginia any information they may request for the purpose of ascertaining my eligibility for relief under the Real Estate Tax Exemption Ordinance of the Town of Colonial Beach, VA

Signature _____

Printed Name _____

Address _____

Date _____

PRIVACY ACT NOTICE: Disclosure of your Social Security Number, if any, on this form is mandatory. The County Department of Tax Administration is requesting this number in accordance with the authority provided by **Virginia Code Section 58.1-3017 and 42 U.S.C. Section 405**. Social Security Numbers are used as a means of identification for the filing, retrieval, and processing of local tax relief applications. Those numbers are also used where necessary to facilitate tax collection and to provide tax refunds to taxpayers. Social Security Account Numbers are regarded as confidential tax information, and except as otherwise provided by law, those numbers will not be disclosed for any other purpose. **If you do not disclose a Social Security Number, you may encounter delays in the processing of your tax relief applications and refunds; and you may not receive renewal notices for your tax relief applications.**