

AFFIDAVIT AS TO SEPARATE FAMILY UNITS FOR HOMESTEAD
PROPERTY

A married couple or family unit can claim only one homestead or similar residency based exemption (Florida Constitution, Article VII Section 6(b)). In rare instances, a married couple may qualify for more than one exemption, but it must be demonstrated that they are financially independent of one another and have clearly established separate family units.

This certifies that _____ and _____ are husband and wife. However, we have established separate "family units". Neither spouse contributes to maintenance of the other's home by making payments such as mortgage, insurance, taxes and/or utilities, or in the form of monetary gifts.

Please answer the questions below and attach documentation requested so your eligibility to qualify for homestead exemption can be determined.

1. Are you and your spouse divorced? Yes _____ No _____
If yes, attach a copy of the Final Judgment if recorded outside Charlotte County and skip questions 2-15.
2. Is a divorce pending? If yes, attach copies of filed documents. Yes _____ No _____
3. Are you separated from your spouse? Since _____ (DATE) Yes _____ No _____
4. What is the date of your marriage? _____ Spouse's Name: _____
5. Spouse's Address _____
6. Does your spouse claim homestead exemption or ANY residency based tax exemption in Florida, any other state or jurisdiction? Yes _____ No _____
7. If yes, address _____
8. Do you each spend time in the other's home, or go back and forth between them? Yes _____ No _____
9. Do you travel, vacation or socialize with your spouse? Yes _____ No _____
10. Do you and your spouse maintain separate bank or financial accounts? Yes _____ No _____
11. Do you have any bank or financial accounts (including, but not limited to, credit cards, retirement, or investment accounts) in both names? Yes _____ No _____
12. Are you a mortgagor on your spouse's home, or is your spouse a mortgagor on yours? Yes _____ No _____
13. Are you listed as a beneficiary on any insurance policy or financial account owned by your spouse, or is your spouse listed as a beneficiary on any insurance policy or financial account owned by you? Yes _____ No _____
14. Do you file your IRS return separately from your spouse? Yes _____ No _____
15. Do you provide support to OR receive support from your spouse in any form including but not limited to: insurance coverage or premium payments, mortgage assistance or payment, utility payments, car payments, or any other form of financial payments or assistance? DOES NOT INCLUDE court ordered alimony or child support. Yes _____ No _____

PLEASE PROVIDE A COPY OF THE ITEMS LISTED BELOW
Section 196.015, Florida Statutes
MONTHLY STATEMENTS REQUIRED ARE DECEMBER OF PRIOR YEAR APPLYING FOR AND
JANUARY OF APPLICATION YEAR

COPY OF DRIVERS LICENSE
COPY OF VOTER REGISTRATION CARD
CABLE BILL/TV
CREDIT CARD BILLS
MORTGAGE STATEMENT & PAYMENT
IRS INCOME TAX RETURN OR NON FILING IRS AFFIDAVIT & DR4506T

UTILITY BILLS (ELECTRIC, WATER)
TELEPHONE BILL
CHECKING ACCOUNT STATEMENT
SAVING ACCOUNT STATEMENT
HOME OWNERS INS BILL & PAYMENT

PLEASE BLACK OUT ALL ACCOUNT NUMBERS & ANY DOLLAR AMOUNTS SHOWN

I understand that separate family units must have been established on or before January 1 of the effective year of the exemption and the burden of demonstrating that we have established separate "family units" is my responsibility. This affidavit is for the purpose of supporting my claim for homestead tax exemption for _____ (YEAR).

I make this statement of my own free will

Signature of Applicant

Print Name

Address of Applicant

City, State and Zip Code

STATE OF FLORIDA
COUNTY OF CHARLOTTE

The foregoing instrument was acknowledged before me this _____ day of _____ year _____,
by _____

Signature of Notary Public

Commissioned Name of Notary Public

Personally Known _____ OR Produced Identification _____

Type of Identification Produced _____

Commission Number: _____