



# 2024

# TRIM SUPPLEMENT



Letter from Charlotte County Property Appraiser

**Paul L. Polk CFA, AAS, RES**

Dear Charlotte County Property Owner,

Each year, on behalf of county taxing authorities, the Property Appraiser mails the enclosed "Notice of Proposed Property Taxes and Proposed or Adopted Non-Ad Valorem Assessments" (TRIM notice), which is not a bill, to each property owner.

The Property Appraiser's role is limited to annual determination of each property's "just value", its classified use value when required, and administration of ad valorem exemptions, in accordance with Florida's Constitution and applicable law. Florida's Supreme Court has determined that "just value" is legally synonymous to 100% of fair market value.

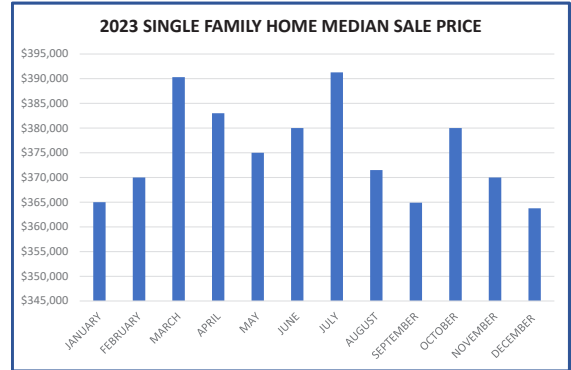
Information on your property's market, assessed, and taxable values, and any exemptions, for both this year (2024) and last year (2023), appears in the "Property Appraiser Value Information" section. If you have questions concerning your property's market value or exemptions, contact this office at the address or telephone numbers listed on the notice, or visit our website at [www.ccappraiser.com](http://www.ccappraiser.com).

In closing, if you purchased a new home or moved during 2024 and believe you may qualify for homestead exemption, application may be made online, by mail or in person at one of our offices by March 1, 2025.

Sincerely,

Paul L. Polk, CFA, AAS, RES  
Charlotte County Property Appraiser

## CHARLOTTE COUNTY



### **IMPORTANT INFORMATION CONCERNING YOUR ASSESSED VALUE FOLLOWING REPAIRS OF HURRICANE DAMAGE:**

F.S. 193.155 (b)1. Changes, additions, or improvements that replace all or a portion of homestead property, including ancillary improvements, damaged or destroyed by misfortune or calamity shall be assessed upon substantial completion as provided in this paragraph. Such assessment must be calculated using the homestead property's assessed value as of the January 1 immediately before the date on which the damage or destruction was sustained, subject to the assessment limitations in subsections (1) and (2), when:

- a. The square footage of the homestead property as changed or improved does not exceed 110 percent of the square footage of the homestead property before the damage or destruction; or
- b. The total square footage of the homestead property as changed or improved does not exceed 1,500 square feet.

## DATES TO REMEMBER

### JANUARY 1

Effective date for all valuations for the tax year. Status of property on this date determines its just value. Effective date of residency requirement to qualify for exemptions.

### MARCH 1

Filing deadline to apply for a property tax exemption with the Property Appraiser's office (pre-file applications are accepted throughout the year).

## OFFICE LOCATIONS

**Murdock Administration Center**  
18500 Murdock Circle, 3rd FL  
Port Charlotte, FL 33948  
Monday through Friday  
8:00 A.M. to 5:00 P.M

**South County Annex**  
410 Taylor Street  
Punta Gorda, FL 33950  
Monday through Friday  
8:00 A.M. to 5:00 P.M

**Mac Horton West Charlotte Annex**  
6868 San Casa Drive  
Englewood, FL 34224  
Monday through Friday  
8:00 A.M. to 5:00 P.M



# 2024 TRIM SUPPLEMENT

## HOW TAXES ARE DETERMINED

Each year, taxing authorities decide how much tax money their budgets require to operate and provide public services. Public hearings listed on this notice are held giving taxpayers the opportunity to participate in the process. The taxable value of your home (total assessed value less any applicable exemptions and CAP protection is divided by 1,000 and multiplied by the millage rate to arrive at the amount of ad valorem taxes due.

The total taxable value provided by our office is used to complete the formula:

$$\text{Total Budgetary Need/Total Taxable value} = \text{Millage Rate}$$

Millage rates can move up or down each year depending on the amount needed to fund local governmental priorities.

## NON-AD VALOREM ASSESSMENTS

Non-ad valorem assessments, listed on the back of the TRIM notice, are “flat rate” fees levied by the Board of County Commissioners and other taxing authorities, independent of a property’s taxable value. Non-ad valorem fees are levied in addition to property taxes. Please take time to review the notice’s important information and direct questions concerning taxes and non-ad valorem assessments to the appropriate taxing authority shown.

## MOVING WITHIN FLORIDA

Your Homestead Exemption does not automatically follow you to your NEW home! You must file for Homestead Exemption and Portability for the new home. Portability may transfer UP TO \$500,000 of your “Save Our Homes” benefit from the old home to your new home. To transfer your assessment difference you must have established a new homestead on or before the third January 1 after abandoning your previous homestead.

## NEW HOME OWNERS

All residences with homestead exemption are subject to a CAP on assessment increases of either 3% or the change in the Consumer Price Index, whichever is less. When you purchase a home from someone who has had a “capped” value, the “capped” value may remain in effect only for the year of purchase. Under Florida law, a residence must be reassessed at market value after a change of ownership. This CAP reset along with the removal of the prior owner’s exemptions may greatly increase the total amount of taxes due.

## INCREASE PROPERTY TAX EXEMPTION AMOUNT

As of January 1, 2023, the property tax exemption amount for Widows/Widowers and Disability increased from \$500 to \$5,000. Those currently receiving these exemptions will see the increased benefit automatically applied.

## CONTACT US



### CALL

Real Property: (Appraisals & Values) **941.743.1498**  
Records: (Exemptions, Change Of Address) **941.743.1593**  
Tangible Personal Property: **941.743.1476**

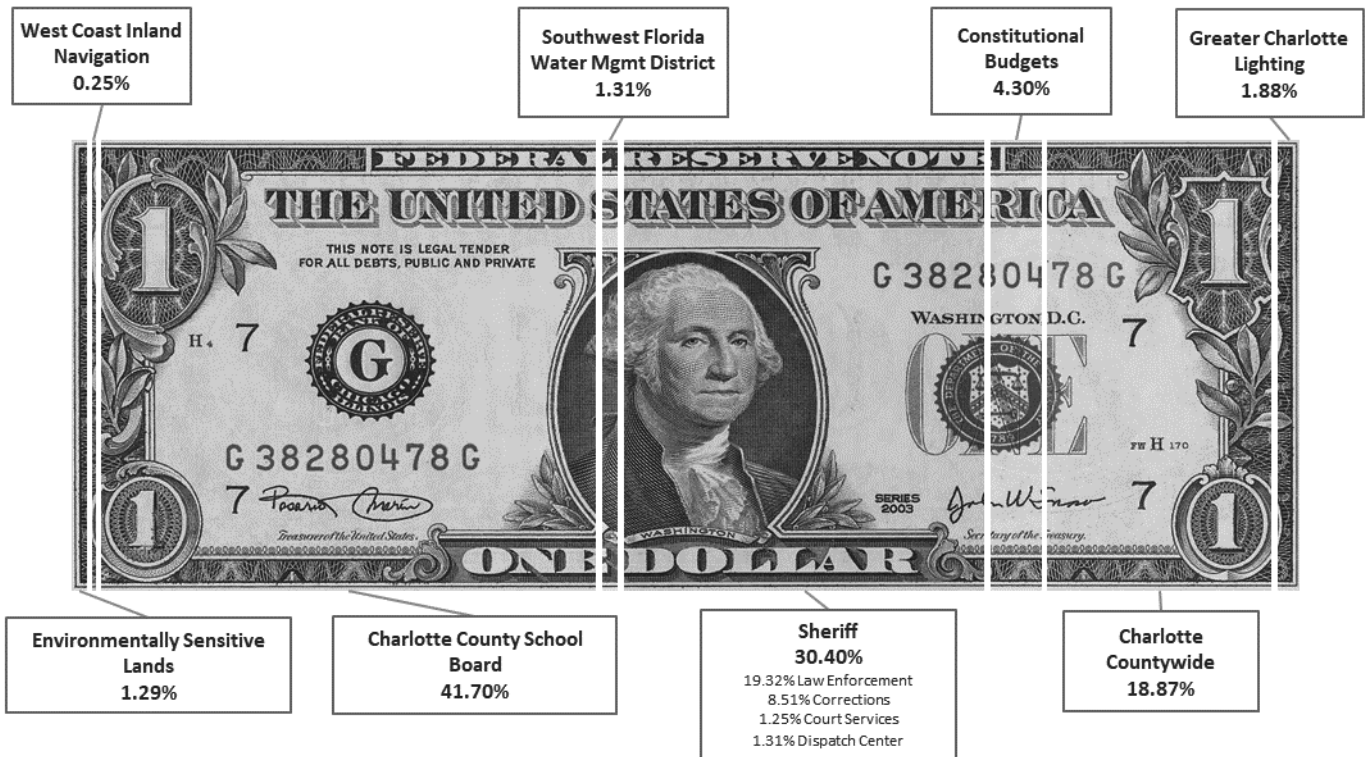


### EMAIL

[rp@charlottecountyfl.gov](mailto:rp@charlottecountyfl.gov)  
[exemptions@charlottecountyfl.gov](mailto:exemptions@charlottecountyfl.gov)  
[tpp@charlottecountyfl.gov](mailto:tpp@charlottecountyfl.gov)

# The Board of County Commissioners' Portion of your Tax Bill

## Fiscal Year 2024/2025



The Board of County Commissioners' portion of your tax dollar goes toward funding a wide variety of operations as follows:

### Charlotte Countywide

**BCC Functions** (2.2142 mills) - The Board of County Commissioners (BCC) is a five-member board elected to represent the citizens of Charlotte County. The commission establishes policies and appoints a County Administrator to implement the policies and manage the operation of the county. The Commission adopts the millage rate annually and approves the budget, which determines the expenditures and revenue necessary to operate all county departments. These dollars fund diverse operations such as Emergency Medical Services, Emergency Management, Parks, Libraries, Mosquito Control.

**Capital Projects** (1.3822 mills) – This allocation funds major capital improvements such as maintaining or constructing government facilities, parks and park facilities, parking lots, sidewalks, etc.

### Constitutional Budgets

(Agencies separate from other county departments.)

**Clerk of Courts** – Fills the roles of Clerk of the Circuit Court, County Treasurer, Recorder, Auditor, Finance Officer and Ex-Officio Clerk of the County Commission.

**Supervisor of Elections** – Administers all federal, state, county municipal and special district elections in the county.

**Property Appraiser** – Prepares an annual tax assessment roll that is approved and certified each year by the Florida Department of Revenue. The local taxing authorities use the assessment roll to set their property tax rates and budgets.

**Tax Collector** – Collects revenue and public funding, pending their timely distribution, to various state, local agencies, and taxing authorities.

### Sheriff

**Sheriff Operations** (2.5723 mills) – This allocation funds the countywide functions of the Sheriff. This includes the Sheriff's constitutional responsibilities of Law Enforcement (1/3 is charged here with the other 2/3 covered under the Public Safety Unit) and Court Security as well as running the Charlotte County correctional facility on behalf of the BCC.

**Charlotte Public Safety Unit** (2.1449 mills) – Covers the unincorporated portion of Charlotte County. This unit is used to fund 2/3 of the Sheriff's constitutional responsibility for Law Enforcement.

The combined millage to fund Sheriff's budget is 4.7172 mills.

Note: Due to the timing of the adoption of the tentative budgets, the Charlotte County School Board, Southwest Florida Water Management District, and West Coast Inland Navigation millage rates were obtained from the Property Appraiser's certified tax roll.