



Dallas Central Appraisal District

2949 N. Stemmons Freeway, Dallas

Direct Mailing Address: PO Box 560328 Dallas, Texas 75356-0328

(214) 631-1342 or www.dallascad.org

**Transfer Request for Tax Ceiling for
Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person**

General Instructions: This form is for use to **Transfer your Tax Ceiling** for the Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption from your *previous* residence to a new residence homestead. Transfer applications cannot be processed until the tax rate(s) is/are set for current tax year. Please allow 30-60 days for processing, after tax rate(s) is/are set. Once your transfer request is processed, a Tax Ceiling Certificate will be sent to the appropriate tax office(s). In order to qualify to transfer your Tax Ceiling, you must qualify for the Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption at your *previous* residence. You may receive the Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption immediately upon qualification of the exemption.

Application Requirements: To transfer your Tax Ceiling, you must complete this Transfer Request form AND a Residence Homestead Exemption Application (Dallas County only) to apply for your Transfer and Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption for the NEW property. Applications can be printed from our website, www.dallascad.org or call 214 – 631- 0910. **Attach** all documents required by the application. If applying for the Disabled Person’s exemption, you must provide a current dated statement from the Social Security Administration showing that **you are disabled** and the **date your disability began**. For details, read **Explanation of Exemptions** included with the application. Exemption applications are *not* accepted by email or facsimile.

Homestead Exemption Requirements: Even though you qualify immediately for the Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption, you do *not* qualify for the Homestead exemption until the first January 1 that you occupied the property. After January 1, when you qualify, you must submit another General Residence Homestead Exemption Application to apply for the **homestead** exemption which is required to retain your Age 65 or Older / Age 55 or Older Surviving Spouse or Disabled Person exemption for that year.

Step 1: Transfer my Tax Ceiling and Exemption FROM my OLD property:

Account Number: _____

Owner Name: _____

OLD Property Address: _____

Date to Transfer my Tax Ceiling and exemption to the NEW property (Required):* _____

***Important Note:** The **Date to Transfer** is **required to process** your request. If the transfer date is other than January 1, the taxes will be prorated based on the loss of the exemption for the portion of the year as indicated by the date provided. This action will generate additional taxes for your *previous* residence.

Step 2: Apply my Tax Ceiling and Exemption TO my NEW property:

If your *previous* residence is **OUTSIDE** Dallas County, **ATTACH** the Transfer Certificate from the chief appraiser of the *previous* county’s Appraisal District.

Account Number: _____

Owner Name: _____

NEW Property Address: _____

NEW Mailing Address: _____

Street Address

City, State, ZIP Code

NEW Appraisal District: _____

Daytime Phone Number: _____

Step 3: Read, Sign, and Date

By signing this Transfer Request form, you certify that the information provided in this application is true and correct to the best of your knowledge and belief.

Signature _____

Date _____

Printed Name _____

Email Address* _____

* Your e-mail address is confidential according to Section 552.137, Tex. Govt. Code; however, by indicating the email address on this form, you are affirmatively consenting to release under the Public Information Act.