

Cherokee County

Elderly Exclusion, Disabled Exclusion, Disabled Veteran Exclusion and Circuit Breaker Deferment

Application Checklist

Items needed for Elderly, Disabled, and Circuit Breaker:

AV-9 form completed and signed

Your Federal Tax Return for the previous year (Form 1040)

If you do not file a Federal Tax Return you must provide all the following that apply:

- | | | |
|-----------|----------|--|
| Yes _____ | No _____ | Social Security Benefits (SSA-1099) (Taxable & Tax Exempt) |
| Yes _____ | No _____ | Supplemental Social Security Benefits (Award letter) |
| Yes _____ | No _____ | Wages, Salaries, Tips, Etc. (W-2) |
| Yes _____ | No _____ | Interest (Taxable & Tax Exempt) (1099-Int) |
| Yes _____ | No _____ | Dividends (1099-DIV) |
| Yes _____ | No _____ | VA Benefits |
| Yes _____ | No _____ | IRA Distributions (Form 8606) |
| Yes _____ | No _____ | Pensions & Annuities (1099-R) |
| Yes _____ | No _____ | Farming Income (1040-SCH F) or (1120-Corp Return) |
| Yes _____ | No _____ | Income from the sale of timber (Harvest reports) |
| Yes _____ | No _____ | Rental Income (1040 SCH-E or 1040-SCH-C) |
| Yes _____ | No _____ | Tribal Per. Cap Income |
| Yes _____ | No _____ | Other Income (Any documentation indicating total annual moneys received) |
| Yes _____ | No _____ | Bank Statements (Previous 12 months) *Only used as last resort of verification |

Items needed for Elderly Exclusion:

- AV-9 form completed and signed
- **Income information as stated above**

Items needed for Disabled Exclusion:

- AV-9 form completed and signed
- Income information as stated above
- AV-9A form completed and signed by a North Carolina Licensed Physician

Items needed for Disabled Veteran Exclusion

- Av-9 form completed and signed
- NCDVA-9 form completed, signed and certified by the United States Department of Veterans Affairs
- Income verification not required
- **For review purposes only NCDVA-9 is required**

Name (Print)

Signature

Date