

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

Application Checklist

Items needed for Elderly, Disabled, and Circuit Breaker:

- AV-9 form completed and signed
- A copy of page one of 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:**
 - Social Security Benefits (SSA-1099) (Taxable & Tax Exempt)
 - Supplemental Social Security Benefits (Award letter)
 - Wages, Salaries, Tips, Etc. (W-2)
 - Interest (Taxable & Tax Exempt) (1099-Int)
 - Dividends (1099-DIV)
 - IRA Distributions (Form 8606)
 - Pensions & Annuities (1099-R)
 - Farming Income (1040-SCH F) or (1120-Corp Return)
 - Income from the sale of timber (Harvest reports)
 - Rental Income (1040 SCH-E or 1040-SCH-C)
 - Tribal Per Cap Income
 - Other Income (Any documentation indicating total annual moneys received)
 - Bank Statements (Oct, Nov, Dec 2015) *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**