

# TAX REDUCTION CLAIM

To qualify for the parcel tax exemption during any tax year (July 1 – June 30), you must have attained age 65 years prior to the preceding June 30<sup>th</sup>. Also, you must be a beneficial owner\* of all or any portion of the parcel, and you must use the parcel as your principal place of residence. If you believe you will qualify as of June 30<sup>th</sup>, please complete this form and return it to the Portola Valley School District Office prior to May 31. You only need to complete this form once. It is not necessary to complete it for each tax year.

\_\_\_\_\_

Last name

\_\_\_\_\_

First name

\_\_\_\_\_

M.I.

\_\_\_\_\_

Street address

\_\_\_\_\_

City

\_\_\_\_\_

State

\_\_\_\_\_

Zip

\_\_\_\_\_

Home phone

Assessor Parcel Number: \_\_\_\_\_  
(You can find this number on your property tax bill.)

**1**

Check here if you will be 65 or older as of June 30, of the current tax year.

**2**

Attach to this form a COPY of one of the following documents as proof of age.  
(DO NOT SEND ORIGINAL DOCUMENTS)

Driver’s License

MediCare Card

Birth Certificate

**3**

Attach a copy of one of the following documents to verify that you are the beneficial owner and live in the residence at the above address.  
(DO NOT SEND ORIGINAL DOCUMENTS)

Property Tax Bill

Other \_\_\_\_\_

**4**

Read and sign the following statement:

***I certify that I own and reside at the property listed above. Under penalty of perjury, I declare that this claim (including copies of proof documents) is, to the best of my knowledge, correct and complete.***

\_\_\_\_\_

Signature

\_\_\_\_\_

Date

\* Beneficial owner means that the property title is in your name, or is held for your benefit by a trustee or other fiduciary who acts on your behalf, such as a partner, corporation, obligee under a contract of sale, etc.

**Return to the Portola Valley School District no later than May 31 of the current tax year.**

4575 Alpine Road  
Portola Valley, CA 94028  
(650) 851-1777