

**ADDENDUM TO HOMESTEAD EXEMPTION  
APPLICATION (SEPARATE FAMILY UNITS)**

PARCEL #: \_\_\_\_\_

TAX YEAR \_\_\_\_\_

NAME: \_\_\_\_\_ SITE ADDRESS: \_\_\_\_\_

A married couple or family unit is allowed to claim only one homestead exemption or residency based tax exemption (FL Constitution Article VII Section 6(b)). Please answer the questions below and attach documentation as requested, so that we may determine your eligibility to qualify for homestead exemption.

1. Have you and your spouse divorced?  Yes  No If yes, date of divorce \_\_\_\_\_  
**If yes, attach a copy of the Final Judgment if recorded outside Walton County, and skip questions 2-15. Sign and return.**
2. Is a divorce pending?  Yes  No **If yes, attach copies of filed documents.**
3. Are you separated from your spouse?  Yes  No If yes, since (date) \_\_\_\_\_
4. What is the date of your marriage? \_\_\_\_\_ Spouse's Name \_\_\_\_\_
5. Spouse's Address \_\_\_\_\_
6. Spouse's Phone Number \_\_\_\_\_
7. Does your spouse claim a homestead or ANY residency based tax exemption in Florida, any other state or jurisdiction? (Including District of Columbia and Puerto Rico)  Yes  No

**If you checked NO for question 7, attach proof that your spouse does not benefit from a residency based tax exemption, and skip questions 8 – 15. Sign and return.**

**If you checked YES for question 7, answer remaining questions below in order to determine your eligibility for an exemption under the Separate Family Units status. Sign and return.**

8. Do you spend time in the other's home or go back and forth between them?  Yes  No
9. Do you travel, vacation, or socialize with your spouse?  Yes  No
10. Do you and your spouse maintain separate bank or financial accounts?  Yes  No
11. Do you have any bank or financial accounts (including, but not limited to, credit card, retirement, or investment accounts) in both names?  Yes  No
12. Are you a mortgagor on your spouse's home, or is your spouse a mortgagor on yours?  Yes  No
13. Are you listed as a beneficiary on any insurance policy, trusts, wills or financial account owned by your spouse or is your spouse listed as a beneficiary on any insurance policy, trust, will, or financial account owned by you?  Yes  No
14. Do you file your IRS return separately from your spouse?  Yes  No

**Attach a copy of most recent IRS tax return. You may redact income and social security numbers.**

15. Do you provide support to OR receive support from your spouse in any form including but not limited to: insurance coverage or premium payments, mortgage assistance or payment, utility payments, car payments, or any other form of financial payments or assistance? DOES NOT INCLUDE court ordered alimony or child support.  Yes  No

I understand that additional documentation may be required. I understand that under section 196.131(2), Florida Statutes, any person who knowingly gives false information to claim homestead exemption is guilty of a first-degree misdemeanor, punishable by imprisonment up to 1 year, a fine up to \$5,000 or both. Under penalties of perjury, I declare that I have read the foregoing addendum and the facts in it are true.

\_\_\_\_\_  
Signature (Required)

\_\_\_\_\_  
Date

\_\_\_\_\_  
Daytime Phone

PARCEL #: \_\_\_\_\_

NAME: \_\_\_\_\_

**Separate Family Unit Checklist**  
**(Copies of the following must be attached to the application)**

- \_\_\_\_\_ Drivers License
- \_\_\_\_\_ Voters Registration
- \_\_\_\_\_ Vehicle Registration
- \_\_\_\_\_ Copies of Bank Statements
- \_\_\_\_\_ Copy of Annual IRS Return
- \_\_\_\_\_ Utility Bills
- \_\_\_\_\_ Cancelled check for:
  - \_\_\_\_\_ Real Estate Taxes
  - \_\_\_\_\_ Mortgage Payments
- \_\_\_\_\_ Home Owners Insurance Policy
- \_\_\_\_\_ Notarized Separation Papers