

# **ELDERLY & HANDICAP TAX RELIEF PAPERWORK**

1. Copies of your last three (3) bank statements from **ALL** accounts
  - a. *OCT, NOV, & DEC of previous year*
2. Statements for **ALL** Certificates of Deposit (CD's) IRA, 401-K, ETC.
3. A copy of the "DECLARATION" page and a copy of the "CASH VALUE" page from **ALL** life insurance policies.
4. Copies of last three (3) years Federal & State Income Tax Returns
5. Copy of Social Security Yearly Statement
6. Copy of your Driver's License or other photo id
7. Copy of your Fuel Assistance Client Notification
  - a. "Commonwealth of Virginia Energy Assistance Program"
8. Copy of your "SNAP" Supplemental Nutrition Assistance Program notification

If your net worth exceeds \$100,000.00 (*not including your home and the lot it is sitting on*) please enclose copies of all regular accounts payable, such as mortgage, medical bills, utilities, etc., any outstanding debts that may reduce your net worth.