

Low-Income Senior Parcel Tax Exemption

YOUR TAX DOLLARS
AT WORK



Could you be exempt from paying the Safe, Clean Water parcel tax?

Valley Water (Santa Clara Valley Water District) offers an exemption from this tax if you are a qualifying low-income senior. **If you qualify, apply between April 15 and June 30, 2024, to save approximately \$70 on your property tax bill.**

The Safe, Clean Water and Natural Flood Protection Program was renewed and approved by voters in November 2020 and is based on six key community priorities to ensure a safe, reliable water supply while supporting the public health and public safety of our community. More information can be found online at: valleywater.org/safecleanwater.

Funding for the program comes from a parcel tax on Santa Clara County properties each year. You could be exempt from the tax if you meet **ALL** of the following criteria:

- You were born before June 30, 1960.
- Your total household income for 2023 was below \$68,663. **Total household income is the total gross income for every person over 18 years old who lives in the home.** It excludes capital gains.
- You live in and own the home the tax is assessed on.

Please note that mobile homes in parks and homes that are in an irrevocable trust are not eligible.

If you meet these criteria, complete the application and return with proof of age. Applications and supporting documentation can be submitted via regular mail or as a legible scanned copy via email.



Be sure to include a **COPY** of your proof of age and please **DO NOT** send us the original. This could be a copy of your driver's license, birth certificate, passport, or medical card that shows your date of birth.



Applications submitted via mail:

Valley Water
Senior Exemption Program
5750 Almaden Expressway
San José, CA 95118

Hours: Mon. to Fri., 8 a.m. to 5 p.m., closed noon to 1 p.m.



Applications submitted via email:

SeniorExemption@valleywater.org

For more information about the Safe, Clean Water low-income senior parcel tax exemption, please call our Tax Hotline at **408-630-2810** or email us at [**SeniorExemption@valleywater.org**](mailto:SeniorExemption@valleywater.org).

Envíe un correo electrónico a [**Translations@valleywater.org**](mailto:Translations@valleywater.org) si tiene preguntas sobre este documento.

Vui lòng liên hệ với [**Translations@valleywater.org**](mailto:Translations@valleywater.org) nếu bạn có thắc mắc về tài liệu này.

如果您对此文件有任何疑问, 请联系 [**Translations@valleywater.org**](mailto:Translations@valleywater.org)

Low-Income Senior Parcel Tax Exemption

YOUR TAX DOLLARS
AT WORK



Frequently Asked Questions:

What is acceptable documentation for proof of age?

Acceptable documents for proof of age are:



Copy of your driver's license even if you have not renewed it



Copy of your birth certificate even if you have a different last name now



Copy of your passport



Copy of a medical card that shows date of birth

If none of these documents are conveniently available to you, please call us at **408-630-2810** to help resolve the situation.

What does Valley Water consider to be total household income?

Total household income is the total of all income for all persons over the age of 18 living in the home. It includes taxed and non-taxed income. The only exclusion from the total is a one-time sale of property (capital gains).

Taxable income would include income from renting out a room. The yearly income of a person who rents from you is not considered part of your household income.

Example 1: Mr. A and Mrs. A both get social security and money from a mature life insurance annuity. The total household income includes both of their social security payments and the income from the annuity.

Example 2: Mrs. B rents out a room in her house for income in addition to her social security. Her total household income is the rent minus expenses associated with the rental, plus her social security.

It doesn't say anything about sending in proof of income. Do I have to send anything in to verify I meet the income requirement?

No, we do not require any proof of income. Your signature on the form is enough legal proof for us. By signing the form, under penalty of perjury, you are legally declaring that you meet the income requirement.

Do I have to re-apply every year?

No, you do not have to fill out an application every year. Once you have been accepted in the exemption program, we will keep your information on our exemption list. Every April, we will send you a postcard to verify that you continue to meet the low-income threshold, which is adjusted annually. If your annual household income was less than the annual low-income threshold, no further action is required and we will continue your special tax exemption. If your annual household income is greater than the annual threshold, you are required to promptly notify Valley Water by checking a box and returning the postcard back to Valley Water. You do not have to include any proof of income or age.

[Continued on the back »](#)

Low-Income Senior Parcel Tax Exemption



Frequently Asked Questions (Continued)

Will I get a refund check every year?

No. This program is meant to be an exemption, not a rebate. This means that once you have applied and been accepted into the program, you will not be charged the Safe, Clean Water special tax on your next property tax bill.

I thought I applied for an exemption. Why am I still paying a special assessment on my property tax for FLOOD CTL DEBT?

Valley Water levies special assessments for several flood control zones (East, Central, N. Central and Northwest). The assessment on your property tax bill for FLOOD CTL DEBT is not included in our exemption program. When the Benefit Assessment Act creating the flood control special assessment was passed by the voters, it did not have a provision that allowed for a low-income senior exemption. When Measure B (Safe, Clean Water) was renewed as Measure S in 2020, Valley Water maintained an exemption for low-income seniors. The measure was approved by more than two-thirds of the voters in the county. That is why the exemption is available only for the Safe, Clean Water special tax and not for the special assessment shown as "FLOOD CTL DEBT" on your property tax bill.

How can I tell if I am getting my exemption?

You are receiving your exemption if you **do not** see a charge on your property tax bill for the following assessment tax:

1023 SAFE, CLEAN WATER

Here is an example of the Special Assessment Taxes on your property tax bill. This example shows the charge for 1023 SAFE, CLEAN WATER. This charge will not be on your bill if you are getting the exemption. You may still see the charge for FLOOD CTL DEBT, which is the charge we cannot give an exemption for.

Example of tax bill showing Special Assessment Taxes:

Special Assessment Taxes	
FLOOD CTL DEBT #882	\$21.08
LIBRARY PARCEL TAX #802	\$36.88
MEASURE AA #980	\$12.00
MEASURE Y 2016 #780	\$72.00
MOSQUITO ASMT #2 #848	\$8.74
SAFE, CLEAN WATER #1023	\$69.02
SCCO VECTOR CONTROL #847	\$5.08
SCVOSA ASMT #1 #990	\$12.00
SCCOSA MEASURE T #1020	\$24.00
SEWER SANI/STORM #800	\$594.12
Special Assessments	\$854.92

1023 SAFE, CLEAN WATER charge will be removed. (Charge varies each year.)

Who do I contact if I have more questions?

If you have other questions or need assistance, please contact Valley Water's **Tax Hotline** at either **408-630-2810** or send an email to **SeniorExemption@valleywater.org**.

Low-Income Senior Parcel Tax Exemption

YOUR TAX DOLLARS AT WORK



Application form 2024/2025

Enrollment period April 15-June 30, 2024

Property owner's name: *

Birthdate: * Phone: * Email address: *

Property street address: *

City: * State: * ZIP: *

Mailing address: (If different than property address)

By signing below, I hereby certify and declare under penalty of perjury under the laws of the State of California that the following is true and correct:

1. That I am at least 65 years of age; and
2. That my total household income for 2023 was less than \$68,663.
3. That I own my home and live in it as my primary residence.

Further, I pledge the following:

1. I will review Valley Water's annual notice of the low-income threshold for the Safe, Clean Water special tax exemption (mailed in April each year); and
2. If in any year my annual household income exceeds the annual low-income threshold for the Safe, Clean Water special tax exemption, I will promptly notify Valley Water.

Print Name: *

Signature: * Date: *

Please sign the application and mail or email to Valley Water (see back for contact information) along with a COPY of your proof of age. If you are signing on behalf of a senior, include a copy of your power of attorney, conservatorship or trustee documentation.

* Indicates required information

FOR OFFICE USE ONLY- PLEASE DO NOT WRITE BELOW THIS LINE

Date Received: _____

Verified by: _____

Verification method: driver's license passport birth certificate medical card

Application form 2024/2025



Please check before mailing:

- Filled out all the required information.
- Signed and dated the form.
- Included a copy of proof of age.



Applications submitted via mail:

Valley Water
Senior Exemption Program
5750 Almaden Expressway
San José, CA 95118

Hours:

Monday to Friday, 8 a.m. to 5 p.m.
Closed noon to 1 p.m.

Phone:

408-630-2810



Applications submitted via email:

SeniorExemption@valleywater.org