

MEDIA RELEASE

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Administration

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Lawrence E. Stone, Assessor

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Assessor Consumer Alert

HOMEOWNER'S EXEMPTION, NO CHARGE FOR FILING

Homeowners beware: Property Tax Assessor Records Corp. (PTARC), a Chicago company, is once again charging for a service provided free of charge by the Santa Clara County Assessor's Office.

"It's outrageous," said County Assessor Larry Stone "there's simply no reason at all for a property owner to pay a fee to a private company for a service taxpayers receive from my office without cost." Owners of homes, which may or may not have a Homeowner's Exemption on file with the Assessor, have been receiving solicitations from PTARC offering to provide a completed exemption claim form for a \$25 fee.

The Assessor's Office has never charged for filing the simple, one page Homeowner's Exemption claim form. Any property owner may file a claim directly with the Assessor at no charge and without using the service offered by PTARC, or any other company.

On a regular basis, buyers of residential properties are automatically sent claim forms by the Assessor's Office. Once the exemption is granted, it remains on the property until the property is transferred or is no longer the owner's principal place of residence.

In Santa Clara County over 275,000 residential property owners already receive this exemption. A property owner can verify they have the exemption by examining the annual property tax bill mailed each October. If the Homeowner's Exemption line shows any amount other than zero, the exemption is valid and no further action is necessary. Property owners can also verify electronically by going to the Assessor's Property Lookup website at www.scc-assessor.org/ari.

The Homeowner's Exemption reduces the assessed value of an owner-occupied residence by a maximum of \$7000, and results in a property tax annual savings of approximately \$70. To qualify for the exemption, the property owner must occupy a property as the principal place of residence on January 1, or within 90 days after the date the property was acquired, or new construction completed. Principal place of residence generally means where:

- You return at the end of the day
- You are registered to vote
- Your vehicle is registered
- Your mail is delivered

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A dwelling does not qualify for the exemption if it is, or is intended to be, rented, vacant and unoccupied, or is a vacation or secondary home of the claimant. Property owners are entitled to no more than one Homeowner's Exemption within the State of California.

To receive the full benefit, a property owner must occupy the property as of the lien date (January 1), and submit the claim by 5:00 p.m. on or before February 15. If a claim is received between the February 16 and 5:00 p.m. on December 10, 80% of the exemption will be awarded.

To receive a claim form, a homeowner may call the Assessor's Exemption Unit at (408) 299-5500 or e-mail the Assessor's Office at Exemptions@asr.co.scl.ca.us. When contacting or e-mailing the Assessor's Office please include the property address and, if known, the assessor parcel number.

Throughout California and the nation, PTARC practices have been the subject of consumer alerts. Not only does PTARC attempt to charge for a service provided by the Assessor for free, they also request the property owner's social security numbers and signature. Everyone should be very cautious in providing such personal information to non-governmental agencies, particularly if it is unknown what measures have been instituted to safeguard the information from misuse, including potential identity theft.

Finally, taxpayers who have received this solicitation are urged to review the fine print which states that PTARC plans to also provide additional market information services for a total charge of \$49. Property owners will be charged the additional fee unless they proactively check a box on the PTARC form. The language is misleading and without close attention, PTARC may charge the full amount.

Complaints can be made to the Santa Clara County District Attorney's Mediation Unit (408-792-2880), Better Business Bureau at <http://complaints.bbb.org/Welcome.asp>, to your local postmaster or the Postal Inspector, 1 800 372-8347. Postal officials have the authority to investigate and fine companies for mail fraud and similar scams.

Additional information is available on the Assessor's website, www.scc-assessor.org.

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