Frequently Asked Questions

What if I don't own the home yet?
If you are shopping for a home, you cannot apply for the exemption to avoid Escrow costs. You cannot apply until the deed is recorded.

Can I call your office for a status update on my application?
No. Once our office sends your application to the state, we are not notified of any application status. We also cannot contact the state to ask for an update on your behalf. The process can take as long as 90 days. You may call our office to check on the application after the 90 days have passed.

Do you need my entire tax package?
Yes, to be very clear we need your absolute entire tax package to determine the income threshold.

Does the income threshold ever change? If so, when?
Yes. Every two years, but sometimes every year.

Are Surviving Spouses eligible?
Yes. Surviving Spouses are eligible provided the deceased veteran would have met all eligibility requirements, including being rated at 100% Permanent & Total (P&T) during their lifetime. For these applications, we would also need a marriage certificate and a death certificate.

For more information and frequently asked questions, please go to our website, www.montgomerycountypa.gov/RETXFAQ.
What is the criteria?

There are five criteria to get this exemption.

1. **Wartime Service**

   Must have served during Wartime or Armed Conflict, but did not have to serve in combat.
   - If you did not serve during published timeframes for Wartime, service during an Armed Conflict is evidenced by receiving the Armed Services Medal, an Expeditionary Medal, or being attached to a ship that received those medals at the time they were aboard.
   - Interesting fact: Naval vessels receive awards the same as the military personnel who serve on them.
   - Wartime Service - go to our website for service dates or scan this QR Code with your phone.

2. **Be 100% Disabled (or have an unemployability designation) with a “Permanent and Total” Designation**

   This is written on your annual award letter or download the letter at [www.ebenefits.va.gov](http://www.ebenefits.va.gov) under “Manage.” Click “Download and Record,” then “VA Letters.”

   Veterans who are blind, paraplegic, and double amputee may also be eligible.

3. **Honorable or General Under Honorable Conditions Discharge**

   This is indicated on your DD-214 or military paperwork.

4. **Own the Home as a Primary Residence**

   You must assert this is your primary residence and prove Pennsylvania as your legal state of residence (usually with a Driver’s License or DMV-issued ID).

   The Deed of the home must be in your name or you and your spouse’s name. Children and LLCs are not allowed, while only certain Trusts are allowed.

5. **Meet Income Requirements**

   The veteran must make less than the income limits posted at:
   - [www.montgomerycountypa.gov/VACountyBenefits](http://www.montgomerycountypa.gov/VACountyBenefits)

   “Income” includes, wages, pension, social security payments, dividends, gambling earnings, etc.

   Disability Compensation and Combat-Related Special Compensation, although not taxable, may count as income for this program.

What is the process?

1. Pre-apply at [www.montgomerycountypa.gov/RETXapp](http://www.montgomerycountypa.gov/RETXapp)

   Reminder: you MUST continue to pay taxes

2. A Veteran Service Officer will determine eligibility and collect the following required documents:
   - Copy of Deed
   - DD-214 or military discharge paperwork
   - VA Award Letter
   - Copy of PA Driver’s license or state-issued ID
   - Evidence of income (usually the latest Federal Tax Filing)
     - If not required to pay taxes, include sources of income such as SSR statements or 1099-R Pension.

3. The County Assessor’s office date stamps the application. This date stamp is the actual date of exemption if granted.

4. Our office then sends the application to the state who approves or denies the request.

   - **If granted**, you will receive four (4) letters of approval. Keep one copy for yourself and give one copy each to the County Board of Assessment, the School District, and the Township/Borough. It’s important to quickly get it to the County Board of Assessment (boahelp@montgomerycountypa.gov) who actually makes the property exempt and notifies all taxing authorities. This occurs on the January or July tax rolls update.

   - **If not granted**:
     - Due to income, it is only appealable at the state level
     - For any other issue, it is appealed at the County Tax Assessor Board. Our office may testify on your behalf.

[www.montgomerycountypa.gov/veteransaffairs](http://www.montgomerycountypa.gov/veteransaffairs)