

Phelps County Senior Real Estate Property Tax Freeze Program



2026 Base Year Application

Completed application and required documents accepted

March 1 - May 31, 2026

Freeze will not take effect until the 2027 Tax Year.

Date of Application _____ Phelps County Real Estate Tax Account Number _____

Please Print

Property Address _____ City _____

Owner of Record _____ *As recorded in Recorder's Office*

APPLICANT INFORMATION

Applicant Name _____ DOB _____
Must be 62 or older on or before December 31, 2026

Co-Applicant _____ DOB _____

Ownership Type _____ Individual/Joint _____ Other Entity (Attach trust or operating agreement, etc.)

Mailing Address _____

City _____ State _____ Zip Code _____

Phone Number(s) _____

E-mail Address _____

PROPERTY INFORMATION

- Yes No Is applicant responsible for paying property taxes? *May be paid through mortgage lender.*
- Yes No Is this property the applicant's primary residence?
- Yes No Is any part of the residence rented?
- Yes No Have any improvements or additions been made to the property the past year?
- Yes No Are there additional structures beyond the main dwelling unit located on the property?
- Yes No Are you claiming a primary residence in another county, state or country?
- Yes No Is the residence a manufactured home (mobile home)?
Property that is taxed as personal property does not qualify for this program.

REQUIRED DOCUMENTS

Please attach copies of the required documents to this application.

Proof of Identity and Age (required for both applicant and co-applicant)

Include ONE of the following: Government-issued identification, such as Driver's License, Birth Certificate, Passport, etc.

Proof of Phelps County Residency (required for both applicant and co-applicant)

If NOT a registered voter in Phelps County, must provide proof of residency. Example: current utility bill, mortgage statement, etc.

Proof of Ownership Is the property in a Trust Yes No

Include a copy of deed identifying Applicant as an owner of the property. If the property is in a Trust, you must ALSO provide copies of Trust documents proving the applicant is a Trustee or Beneficiary of the property.

A Deed of Trust and a Deed of Release are mortgage documents, and DO NOT qualify as proof of ownership. Neither does a Beneficiary Deed on that which the applicant is grantor (or party of the first part).

CERTIFICATION

Please Sign Below (mandatory for applicant/co-applicant):

I have read the attached Certification Statements included in this application and understand them and certify responses are true and accurate.

Applicant/Co-Applicant Signature _____ Date _____

Joint applicants should sign as such: Bill and Mary Smith or Bill Smith and Mary Jones

In addition to the signature of the applicant/co-applicant, if a facilitator is present, please complete the facilitator form.

Facilitator Print Name _____ Date _____

OFFICE USE ONLY	<input checked="" type="checkbox"/> Approved <input checked="" type="checkbox"/> Denied	<input checked="" type="checkbox"/> Computer
Approved by: _____	_____	_____
Collector	Commission	Date

CERTIFICATION - CONTINUED

1. I have read the statements and questions included in this application and understand them and certify that all responses are true and accurate.
2. I have the authority to act on behalf of the owners and occupants of the Property, and I have not claimed more than one primary residence as a homestead for the purpose of a property tax freeze in Missouri or elsewhere.
3. I understand the County will rely on the information provided by the Applicant in this Application and this Certification is a material representation in evaluating this application for the Tax Freeze.

I specifically certify the following:

- a. I am a resident of the State of Missouri in the County of Phelps.
- b. Applicant is 62 or older on or before December 31, 2026.
- c. I am the owner of record of the homestead for which I am seeking a property tax freeze or have legal or equitable interest in such property by written instrument.
- d. I am liable for the payment of real property taxes on such homestead.
- e. I occupy the homestead as my primary residence for which I am seeking the Phelps County Senior Real Estate Tax Freeze.

I understand I may be charged with a Class A misdemeanor as stated in Section 575.050 and/or 575.060 RSMo, if any information submitted in this application is found to be a false declaration and I am not aware of any information that would prohibit or disqualify me from receiving the tax freeze for the homestead identified in this Application.

FAQ - FREQUENTLY ASKED QUESTIONS

Is a senior automatically in the program or do I have to apply? Do I have to reapply every year?

You are not automatically enrolled in the program and must submit an application and an annual renewal form thereafter to ensure eligibility is still being met. This also provides documentation for auditing purposes and the County’s ability to be accountable to its citizens.

What is a Base Year?

The Base Year is the year that you apply. You will not see the Tax Freeze until the year following the Base Year Application.

I have more than one property, do I get the real estate property tax freeze on all of them?

No, the Tax Freeze can only be applied to the primary residence.

If I sell my home and buy a new home, does the tax freeze transfer to the new home?

No, the Tax Freeze does not transfer. If an eligible person moves and purchases another primary residence, they need to submit another application to participate in the program at that residence and a new Base Year will be established.

If there is more than one homeowner, do all of them have to be 62 or older to apply for the program?

No, only one of the people living and owning the home needs to be 62 years old by December 31st the year of application to participate. However, both should be included on the application.

Will my taxes be exactly the same each year after they are frozen?

No, they will not be exactly the same due to debt levy obligation changes and any new taxes voted in by citizens.

Can I be removed from the program?

Yes, for one of the following reasons: If a transfer of title is made, if property interests in a written instrument expire, failure to submit an annual renewal application, fraud, or real property no longer qualifies.

If I am approved, how will I know the amount of tax freeze I am receiving?

The tax freeze amount will be listed on the statement of tax due for the applicable tax year.

NOTES
