

A FEW WORDS FROM MATT



Dear Property Owner:

As your Lee County Property Appraiser, it is my duty to produce a fair and equitable tax roll each year in compliance with the Florida Constitution and applicable laws.

One requirement of this process is to provide each property owner with an annual Notice of Proposed Property Taxes, known as a TRIM (Truth in Millage) Notice. The attached notice reflects the valuation of your property as of January 1, 2023 and the proposed ad valorem taxes for the 2023 tax year.

As Florida taxpayers, you benefit from a Property Owner Bill of Rights, as well as numerous potential exemptions and classifications. I encourage you to visit our website, www.leepa.org, and explore the rights and opportunities that accompany your property ownership in Lee County.

Our office is here to serve you. Please do not hesitate to contact us with any questions you may have about either this TRIM Notice or any other property related questions. Our door is always open.

Best Regards,

Matthew H. Caldwell
Lee County Property Appraiser

PROPERTY OWNER RESOURCES

Website Services - www.leepa.org

On our website you can:

- View, save or print your TRIM Notice
- Review property details including exemptions, sales, maps and photos
- Report Hurricane Damage
- Apply for property tax exemptions
- Update exemption information
- Change your mailing address
- Chat with a customer service representative
- File a tangible personal property tax return
- Complete a sales verifier or commercial questionnaire
- View the Property Owner Bill of Rights



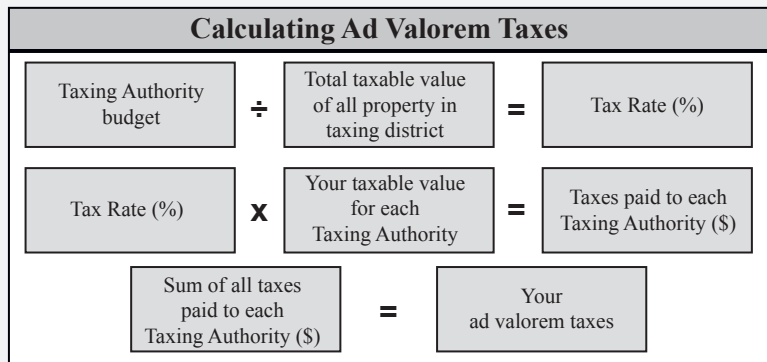
Personal Exemptions Available

Visit our website or contact our office for more information regarding:

- Homestead
- Homestead on contiguous parcels
- Additional homestead for persons 65 and older (income limits apply)
- Additional homestead for deployed servicemembers
- Widows/widowers
- Blind persons
- Disabled persons
- Disabled veterans and surviving spouses
- Disabled first responders and surviving spouses

AD VALOREM TAXATION

An ad valorem tax is a tax based on the value of property. Taxing authorities are agencies that levy a millage (tax rate) for government or other public services. The taxing authorities use the value of property to determine the tax rate (millage) you pay based on money needed to fund their budgets. The diagram on the right illustrates the basic ad valorem tax calculation that produces the amount of taxes you pay each year. If you have questions regarding tax rates or the amount of taxes you are paying, please contact the appropriate taxing authority listed on the front page of your notice.



PROPERTY EXEMPTIONS & ASSESSMENT LIMITATIONS

Every person who owns real property in Florida on January 1, and makes the property his or her permanent residence, may be eligible to receive a homestead exemption up to 50,000. The first 25,000 applies to all property taxes, including school district taxes. The additional 25,000 applies to the assessed value between 50,000 and 75,000 and only applies to non-school taxes.

Homestead Exemption **up to 50,000**

Senior's Homestead Exemption **up to 250,000**
Subject to prior year adjusted gross household income limitation. **35,167**

Homestead Property Assessment Limitation **3%**
"Save Our Homes"

Based on the Consumer Price Index (CPI) - Assessed values for most homestead exempt properties may not increase more than 3% or the current CPI, whichever is less. Additions and new construction are not subject to the limitation.

Non-Homestead Property Assessment Limitation **10%**
Assessed values for most non-homestead or non-special use properties may not increase more than 10%.

Recapture

If market value exceeds assessed value, property appraisers must increase the assessed value by the recapture rate until market and assessed values are equal.

Recapture rate for homestead properties **3%**
Recapture rate for non-homestead properties **10%**

Tangible Personal Property Exemption **up to 25,000**
Granted with a timely filing of a DR-405 tax return.

IMPORTANT INFORMATION -- HELP US HELP YOU

Nearly one-year post Hurricane Ian many of us have returned to our everyday lives and routines while many others continue to cope with storm-related challenges and frustrations. Our heartfelt sympathy goes out to everyone affected by the storm.

The enclosed Notice of Proposed Property Taxes (TRIM) reflects our efforts to account for the impact of Ian on your property. As you continue to recover, keep in mind we may need your assistance to be sure your property's valuation and exemptions reflect the appropriate status as of January 1, 2023. As you review your TRIM Notice, please be aware that some hurricane damage and related repairs may affect the market value of your property, and some may not.

Our team has evaluated the impacts of hurricane damage on a mass scale. We have reached out individually, have canvassed neighborhoods to record viewable damage and knocked on doors to get internal damage reports. We have a damage reporting section on our website that thousands of you have used.

We were successful at reaching many, but not all, who were affected. If you find that all information recorded on your TRIM Notice is correct and there are no changes to report, no further action is required of you. If you feel that we did not accurately reflect your value and/or exemptions, contact us immediately by going to our website and entering your personalized code found at the bottom of your TRIM Notice. You will also find additional important personalized information as it impacts you and your property.

ASSESSMENT APPEALS INFORMATION

You, the property owner, are the single best source of information as it relates to your property. If you have questions about the valuation, exemptions, classification or characteristics of your property, we encourage you to contact our office to discuss your concerns.

If you disagree with the current market value of your property or believe you qualified for an exemption or property classification not reflected on your TRIM Notice, you may:

- Request an informal conference with our office.
- File a petition with the Value Adjustment Board.
- File a lawsuit in circuit court.

Informal Conference

An informal conference with the property appraiser's office, while not required, is encouraged as a first step in addressing your concerns. By having an informal conference, you may be able to settle the issue without going to a hearing or going to court.

At this informal conference, you may:

- Provide documentation that may support a change to the assessment or eligibility for an exemption or property classification.
- Request facts that support the current assessment of the property and/or denial of an application for an exemption or property classification.

Please be aware that an informal conference does not extend your deadline to file a petition with the Value Adjustment Board.

To set up an informal conference, please call the Lee County Property Appraiser's office at (239) 533-6100.

Petition the Value Adjustment Board

For information on filing a petition with the Value Adjustment Board, please visit the Lee County Clerk of Court's website at www.leeclerk.org.

NOTICE OF PROPOSED 2023 PROPERTY TAXES

**DO NOT PAY
THIS IS NOT A BILL**

CONTACT INFORMATION

Here at the Lee County Property Appraiser's office we strive to serve all property owners in a way that best suits their needs.

If you have access to the internet, please visit our website at www.leepa.org. There you will find several methods to get in touch with us including "on-line chatting" and setting appointments for telephone call-backs or office visits.

If you are unable to visit our website or would prefer to talk with one of our representatives, please call us at (239) 533-6100 and select the appropriate option. You will be connected with the next available customer service representative. If all of our representatives are already on the telephone with other taxpayers, you will be prompted to leave a message. If you leave a message, our goal is to return your telephone call within 3 business days.

If you choose to visit our office in-person, please be prepared for extended wait times as we receive quite a few visitors this time of year. Your wait may include standing and/or sitting in the office. We appreciate your patience and understanding.

Lee County Property Appraiser

Physical Address 2480 Thompson St, 4th Floor, Fort Myers FL 33901

Mailing Address PO Box 1546, Fort Myers FL 33902-1546

Office Hours

Mon - Fri 8:30 AM to 5:00 PM

Real Property

Phone (239) 533-6100

Fax (239) 533-6091

Email trim@leepa.org

Website www.leepa.org

Exemptions

Phone (239) 533-6100

Fax (239) 533-6038

Email exemptions@leepa.org

Tangible Personal Property

Phone (239) 533-6140

Fax (239) 533-6289

Email tpp@leepa.org

Clerk of Court

(239) 533-5000

www.leeclerk.org

Tax Collector

(239) 533-6000

www.leetc.com

****HURRICANE IAN UPDATE****

IMPORTANT INFORMATION ENCLOSED -- SEE REVERSE SIDE