

**WELFARE EXEMPTION  
ASSESSOR'S FIELD INSPECTION REPORT**

☐ REGULAR ASSESSMENT  
☐ SUPPLEMENTAL ASSESSMENT

Information for Property No. \_\_\_\_\_ Year: \_\_\_\_\_

Name of organization \_\_\_\_\_

Address of **this** property \_\_\_\_\_  
(street, city, zip code)

☐ Owner only ☐ Operator only ☐ Owner-Operator Date of last inspection of property \_\_\_\_\_

If claimant is owner, name of operator is \_\_\_\_\_

If claimant is operator, name of owner is \_\_\_\_\_

A. **Claimant is primarily:** (check only one) ☐ 1. religious ☐ 2. hospital ☐ 3. scientific ☐ 4. charitable

☐ 5. other (explain) \_\_\_\_\_

**B. Use of property**

1. The **primary activity** the property is used for is: (check only one)

- |   |  |  |
|---|--|--|
| <input type="checkbox"/> a. administration        | <input type="checkbox"/> e. fraternal and lodge meetings | <input type="checkbox"/> i. medical (not hospital) |
| <input type="checkbox"/> b. commercial            | <input type="checkbox"/> f. fund raising                 | <input type="checkbox"/> j. recreational           |
| <input type="checkbox"/> c. educational           | <input type="checkbox"/> g. hospital                     | <input type="checkbox"/> k. rehabilitation         |
| <input type="checkbox"/> d. farming               | <input type="checkbox"/> h. housing                      | <input type="checkbox"/> l. informational          |
| <input type="checkbox"/> m. other (explain) _____ |  |  |

2. **Other activities** the property is used for are: a. List letters used in B1 \_\_\_\_\_

b. Other (explain) \_\_\_\_\_

3. **All or part** (write in all or part where applicable) of the property is: a. leased or rented \_\_\_\_\_

b. vacant or unused \_\_\_\_\_ c. in excess of that reasonably necessary \_\_\_\_\_ d. used to  
house personnel whose presence is not institutionally necessary \_\_\_\_\_

**C. Operation of property for benefit of persons**

1. In your opinion are services and expenses excessive? ☐ Yes ☐ No

If answer is **yes**, explain: \_\_\_\_\_

2. In your opinion do operations enhance anyone's private gain? ☐ Yes ☐ No

If answer is **yes**, explain: \_\_\_\_\_

3. In your opinion is the claimant's proposed new capital investment, if any, necessary? ☐ Yes ☐ No

If answer is **no**, explain: \_\_\_\_\_

D. **Ownership of real property** (as of applicable **lien date**) is recorded in exact name of claimant ☐ Yes ☐ No

If answer is **no**, explain: \_\_\_\_\_

\_\_\_\_\_ Did owner file an exemption claim? ☐ Yes ☐ No

**E. Supplemental Assessment** (in claimant's name):

1. Date of change in ownership \_\_\_\_\_ Recorded ☐ Yes ☐ No

Ownership in name of claimant? \_\_\_\_\_

2. Date of completion of new construction \_\_\_\_\_

Explain what was constructed \_\_\_\_\_

3. Date put to exempt use \_\_\_\_\_ If only a portion of the property is put to an  
exempt use, describe exempt and nonexempt portions in detail \_\_\_\_\_

4. Notice: date mailed \_\_\_\_\_ ☐ Not mailed

5. Date claim for exemption from Supplemental Assessment was filed with Assessor \_\_\_\_\_

6. Date first installment of supplemental tax bill becomes (became) delinquent \_\_\_\_\_

F. **A claim for welfare exemption on this property:** 1. was filed last year ☐ Yes ☐ No 2. is new this year ☐ Yes ☐ No

3. was not filed last year but claimed on another property located at \_\_\_\_\_  
(give complete address including zip code)

G. **Recommendation:** 1. Approval \_\_\_\_\_ (all) 2. Denial \_\_\_\_\_ (part) \_\_\_\_\_ (all)

Reason for denial (if partial denial, identify specific area to be denied) \_\_\_\_\_

Date \_\_\_\_\_ Inspection for \_\_\_\_\_, Assessor

By \_\_\_\_\_, Designee