

ALBANY CALIFORNIA

CITY OF ALBANY



FINANCE DEPARTMENT
1000 SAN PABLO AVENUE
ALBANY, CA 94706
510 528-5730

www.AlbanyCA.org

April 27, 2017

RE: Application For Low Income Parcel Tax Exemption & Renter Rebate – Submit By June 1, 2017

The ordinances imposing four City of Albany parcel taxes, Library Services (1994) Library Services (2006), the City of Albany Street Paving and Storm Drain Facility Improvement Parcel Tax (2006), and the City of Albany Sidewalk Special Parcel Tax provide for exemptions for low-income residents. In recognition of the potential hardship these taxes could have on very low-income families, an exemption is available for qualifying “very low-income” homeowners, and the Library Services and Sidewalk taxes also have provisions for a rebate to qualifying “very low-income renters”.

The City Council will determine the actual rates at a future meeting. The following shows the estimated maximum rate for an equivalent Single Family Unit.

Parcel Taxes Eligible For Exemption	Fiscal Year 2017-18 Maximum Rate
Library Services Act of 1994 (Measure N)	\$76.18
Supplemental Library Services Act of 2006 (Measure G)	\$31.53
Albany Street Paving and Storm Drain Facility Improvement Tax (Measure F - 2006)	\$126.14
Sidewalk Special Parcel Tax (Measure P1 – 2016)	\$49.69

The City is being assisted by NBS, a firm that processes fees and taxes placed on the property tax bill by the City. Applications will be mailed directly to NBS and you may also call them at 800-676-7516 if there are questions. The process to receive an exemption for very low-income homeowners and the rebate for very low-income renters is described below:

Income Level Qualifying as “Very Low Income”

Only those homeowners or renters who reside within the City of Albany and whose income qualifies as “very low-income”, as defined by the United States Department of Housing and Urban Development, are eligible for this exemption. The limits are based on two factors: 1) the size of your household (the number of persons living at that address); and 2) The combined “Family*” income for the previous calendar year. The current qualifying income levels are:

Household Size	1	2	3	4	5	6	7	8
Maximum Annual “Family”* Income	\$36,550	\$41,750	\$46,950	\$52,150	\$56,350	\$60,500	\$64,700	\$68,850

HUD 2017 Limit From : <http://www.huduser.org/portal/datasets/il/il2017/2017summary.odn>

***The City code defines "Family" to include one or more persons related by blood, marriage or adoption, who are living in a single Residential Unit and maintaining a common household. Family shall also mean all unrelated persons who live together in a single Residential Unit and maintain a common household.**

Exemption/Rebate Requests

A "very low-income" homeowner or renter, based on the table above, may request an exemption/rebate (For example if two people reside at an address their 2017 annual income must be less than \$41,750). The following steps should be followed:

1. Review whether your household income is below the maximum allowed.
2. A signed application is valid only for the year that it is filed. For example, the 2017/2018 **Application is due by June 1, 2017** and it covers taxes levied for the Fiscal year beginning July 1, 2017 and ending June 30, 2018.
3. The application must be signed and the applicant must certify under penalty of perjury that he/she is eligible for the exemption or rebate and provide adequate documentation. Applicants may be audited and required to submit additional information to verify the income.
4. Applications must be mailed and postmarked no later than June 1, 2017:

**Mail To:
NBS
Attention: City of Albany Parcel Tax Exemption
32605 Temecula Parkway, Suite 100
Temecula CA, 92592**

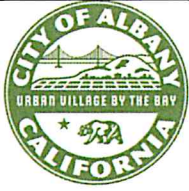
For questions you may contact the NBS Property Owner Services department toll-free at: (800) 676-7516 or by email at pos@nbsgov.com.

5. For Homeowners that are approved an exemption will be recorded and the specific tax will not be included on the 2017/2018 Property Tax bill. Eligible Renters will typically receive a refund no later than September 30th.

The application for the current homeowner exemption or renter rebate must be postmarked by June 1, 2017. If you have any questions, please contact toll free the Property Owner Services department at NBS (800) 676-7516.

Sincerely,

David Glasser
Finance & Administrative Services Director



APPLICATION LOW-INCOME PARCEL TAX EXEMPTION RENTER REBATE APPLICATION

Please type or print clearly

(Check the appropriate box) Homeowner Renter (Library Services and Sidewalk)

Name 1: _____

Name 2: _____

Property Address: _____ Apartment or Unit #: _____

Owner Name If Not Applicant: _____ Parcel Number: _____ (Information on Tax Bill)

Applicant Contact Phone Number: (____) _____

HOMEOWNERS CHECK BELOW:

- I/We wish to apply for the 2017/2018 Exemption from Library Services Parcel Taxes (1994 and 2006 Measures)
- I/We wish to apply for the 2017/2018 Exemption from the Street Paving and Storm Drain Tax (Measure F-2006)
- I/We wish to apply for the 2017/2018 Exemption from the Sidewalk Special Parcel Tax (Measure P1-2016)

RENTERS CHECK BELOW:

- I/We wish to apply for the Renter Refund for Library Services Parcel Taxes Exemption/Renter Rebate
- I/We wish to apply for the 2017/2018 Exemption from the Sidewalk Special Parcel Tax

ALL APPLICANTS MUST ANSWER #1 AND #2, PROVIDE REQUIRED DOCUMENTATION FOR #3, AND SIGN / DATE:

1) Household Size: _____
(Equivalent to the number of persons residing in the home / unit – see Program explanation.)

Household Size	1	2	3	4	5	6	7	8
Maximum Annual "Family"* Income	\$36,550	\$41,750	\$46,950	\$52,150	\$56,350	\$60,500	\$64,700	\$68,850

HUD 2017 Limit From: <http://www.huduser.org/portal/datasets/il/il2017/2017summary.odn>

2) My Family Income in the previous calendar year is below the Maximum Annual Income Above?
 Yes No

3) Please enclose in a sealed envelope a copy of your most-recently filed Form 1040, 1040A or 1040EZ tax return for all persons residing at the above residence. This form will be stamped and kept "Confidential" and will only be used for determining your income qualification. Please include only the page(s) showing income. If you do not file a tax return please provide an alternate means to document your income (i.e. Social Security expected benefits statement).

I/We certify under penalty of perjury under the law of State of California, that the above information is true to the best of my knowledge, and that I qualify as "very low-income" pursuant to the City program requirements. Further, I understand that City may require that I / We submit additional records to verify eligibility.

Signature 1: _____ Date _____

Signature 2: _____ Date _____

MAIL COMPLETED FORM TO:
NBS – Attention: City of Albany Parcel Tax Exemption
32605 Temecula Parkway, Suite 100
Temecula, California 92592

(OFFICE USE ONLY)
Exemption Granted _____ Date _____ NOTE: _____