City of Bellevue
Utility Tax Relief Program
450 110th Ave NE
P.O. Box 90012, Bellevue, WA 98009
Email: utilityrelief@bellevuewa.gov
Phone: (425) 452-5285 Fax: (425) 452-7669

October 1st, 2014

Dear Applicant:

Bellevue's **2014 Utility Tax Relief Program for low-income households** will be accepting appointments and processing applications for this year's program on October 1st through November 20th, 2014. Remember, even if you have been in the program in the past you need to re-apply every year, and are encouraged to apply early to ensure timely processing of your application.

This packet contains two items:

- Program Guidelines for Tax Rebate – This includes the program description, eligibility information, and details on how to apply for the program.
- Program Application – The application must be completed with vital income and household information.

There are two ways to apply for the program – by mail or in person:

- By Mail – If you were in the program in 2013, you may apply by mail. Be sure to sign the application and include all required identification, income, and residency information when returning your application. Incomplete application forms or missing documentation will delay the processing of your application. Please return your paperwork in the return envelope included with this packet.
- In Person – If you are applying for the first time or you were not approved for this program last year (2013), you must schedule an application appointment by calling 425-452-5285 and apply in person.

Whether you apply in person or by mail, all required documentation must be received at the downtown Bellevue City Hall before 5 p.m., PST, on Thursday, November 20th, 2014. If you have any questions, please call 425-452-5285.

Note: It can take 3-4 weeks to process applications. Applicants are encouraged to get their applications as early as possible to ensure timely processing.

Sincerely,

Patricia Burgess

Patricia Burgess, Program Administrator
Utility Rate & Tax Relief Programs
City of Bellevue Utilities

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PROGRAM GUIDELINES FOR UTILITY TAX REBATE

The purpose of this program is to provide utility occupation tax relief to low-income households within the Bellevue service area. The tax relief will come in the form of a rebate check from utility occupation taxes paid to the City. A check will be mailed to all qualifying households who apply for the program in a complete and timely manner.

Deadline for applying is Thursday, November 20st, 2014 at 5 p.m., PST. Completed applications and all required documentation must be received at downtown Bellevue City Hall before the deadline to be considered. Applicants are encouraged to apply early to ensure timely processing of their application.

How do I apply for the program?
You must fill out and return an application with all required identification, residency, and income documentation. An application packet is available on-line at ***www.bellevuewa.gov/utilityrelief.htm*** or you may also call Bellevue Utilities at 425-452-6932 to request a copy.

NOTE: If you qualified for the 2014 Utility Rate Relief Program, you do not need to complete this application. Your qualification in that program also qualifies you for the 2014 Utility Tax Relief Program. You will receive a tax rebate check without additional paperwork.

What happens after I apply?
Your application and required documentation will be reviewed for eligibility. You may receive a follow-up phone call or letter from Bellevue Utilities to clarify submitted details or obtain further information.

When will I get my check?
If eligible, we anticipate your check will be mailed towards the end of December 2014.

How much will I be getting back?
This year's rebate will be approximately $100. If you resided in the Bellevue service area for only part of 2014, you will receive a pro-rated rebate.

How do I know if I am eligible?
To be eligible, you must have lived inside the Bellevue service area for at least one calendar month during 2014, provide a utility bill in your name and qualify as low-income. To be considered low-income, your total annual combined household income* must not exceed the limits shown in the table below.

Number of People in Household:	2014 Household Income* Must Not Exceed:
1	$30,370
2	$34,720
3	$39,070
4	$43,410
5	$46,860
6	$50,380

* Income means "disposable income," as that term is defined in RCW 84.36.383, plus gifts. Total household income includes income for everyone living in your household during 2014. Examples of income and required documentation are described in the "How to Apply" section (see reverse side).

HOW TO APPLY FOR THE UTILITY TAX RELIEF PROGRAM

NOTE: If you qualified for the Utility Rate Relief Program in 2014, you do not need to complete this application. Your qualification in that program also qualifies you for the 2014 Utility Tax Relief Program. You will receive the tax rebate check without additional paperwork.

1. Collect the required documents from the list below.
2. Complete the enclosed application. Read liability statement and sign and date the application.
3. Turn in the completed application before 5 p.m., PST, on Thursday, November 20th, 2014. Late or incomplete applications cannot be processed.
   a. If this is your first time applying or you did not qualify last year (2013), you must schedule an application appointment by calling 425-452-5285 and apply in person.
   b. If you qualified for this program last year (2013), you may return your application by mail to:

      City of Bellevue Utilities, PO Box 90012, Bellevue, WA 98009-9012

REQUIRED DOCUMENTS

In addition to the completed application, please provide the following:

A. Proof of 2014 income. Documentation is needed for every household member. Please bring or mail copies of any of the following that apply to your household situation. If unable to provide income documentation from original source, provide copies of bank statements for all 2014 showing the direct deposits of the income.

- Salary/Wages/Tips, etc. (Provide the three (3) most recent 2014 pay stubs)
- Interest/Dividends
- Alimony/Spousal Maintenance
- Capital Gains
- Business Income, including income from rental properties or rent paid to you by a co-tenant.
- IRA Withdrawals
- Pension/Annuity Payments
- Railroad Retirement benefits
- Unemployment/Labor and Industries (Provide year-to-date statement, or all paystubs)
- Social Security (SSA, SSI, or SSDI)
- Housing Assistance (HUD, Section 8, other)
- Military/Veteran's pay or benefits
- Gifts/Cash
- Any other documents supporting proof of income for 2014

B. Identification is REQUIRED for all household members in 2014. Valid photo identification is required for household members 18 and older. Identification accepted: Driver's License, or WA State ID card, or Passport. For household member under the age of 18, submit a certified birth certificate. Note: Social Security Cards will no longer be used for identification purposes. Please DO NOT SEND ORIGINALS. We cannot guarantee their safety.

C. Proof of Residency is REQUIRED. Show proof of living within the Bellevue Utility service area in 2014 with photocopy of any one of the following: Most recent City of Bellevue utility bill; or Most recent Puget Sound Energy bill with graph page showing your name, address, and usage graph for all of 2014; or 2014 signed lease/rental agreement(s); or have landlord complete the Landlord Form (request copy if needed).

D. Proof of Permanent Disability – if applicable, provide benefit verification statement showing that you are entitled to disability benefits (along with documentation of disability income payments received from SSA, SSI, SSDI, or V.A. during 2014).

FOLLOWING APPLICATION SUBMITTAL

Your application and income documentation will be reviewed for eligibility. You may receive a follow-up phone call or letter from Bellevue Utilities to clarify submitted details or obtain further information. Once application is approved and processed, qualified applicants will be sent a rebate check to the address on the application. The tax rebate check will be sent out in late December 2014 to qualified applicants. If you do not qualify, you will be notified. Applicants must promptly notify Bellevue Utilities if there is a change of address.

City of Bellevue
UTILITY TAX RELIEF APPLICATION

Program Year 2014

450 110TH Ave NE
P.O. Box 90012, Bellevue, WA 98009
Email: utilityrelief@bellevuewa.gov
P: 425-452-5285 – F: 425-452-7669 – TTY: dial 711

1. Applicant's Legal Name (print): _____ _____
   FIRST NAME LAST NAME
2. Provide last 4 digits of Applicant's Social Security Number: _____
3. Current address of your Primary Residence: _____
4. Current mailing address (if different): _____
5. Name of apartment/condo complex (if applicable): _____
6. Phone (with area code): _____ Email address: _____
7. Do you: ☐ Own house/condo ☐ Rent house/condo/apartment
8. Did you qualify this program in 2013? ☐ Yes ☐ No If no, call for appointment to submit application.
9. Have you lived in Bellevue since January 2014? ☐ Yes ☐ No If No, when did you move to Bellevue? _____
10. Do you get a housing subsidy? ☐ Yes ☐ No If Yes, which applies: ☐ Section 8 ☐ HUD ☐ Other: _____
11. How many people (including applicant) lived in your household in 2014? _____
12. **Print a list of everyone living in your household in 2014 below:**

FIRST NAME (Use legal names. No Nicknames.)	LAST NAME	Date of Birth (mm/dd/yy)	Relationship to Applicant
A.			
B.			
C.			
D.			
E.			
F.			
G.			

13. Did anyone living in the household in 2014 have income in 2014 from any of the sources below? You must check off the YES or NO box for each item below and provide all documentation* to verify same.

Y	N		Y	N	
		Salary/Wages/Tips, etc. (Provide three (3) most recent 2014 paystubs for each household member)			Unemployment/Labor and Industries (Provide year-to-date statement, or all paystubs)
		Interest & Dividends			Social Security (SSA, SSI, SSDI)
		Alimony/Spousal Maintenance			Housing Assistance (Section 8, HUD, other Stmts.)
		Capital Gains			Work Study Earnings
		Business Income, include rental income or rental payments from co-tenant			Gift / Cash for 2014 (describe):
		IRA Withdrawals			
		Pension/Veteran's Benefits/Annuity Payments			Other income for 2014 (describe):
		Railroad Retirement Benefits			

* If unable to provide income documentation from original source, provide copies of bank statements for all 2014 showing the direct deposits of the income.

(see reverse side)

Provide COPIES (no originals) of the following documents with your application. Application will not be processed without them.

☐ **Identification** – provide valid picture identification for all persons 18 years and older who lived in the household in 2014. Identification accepted: Driver's License, or WA State ID card, or Passport. For those under the age of 18, submit a certified birth certificate.

☐ **Proof of Residency in 2014** – any one of the following: Most recent City of Bellevue utility bill; or Most recent Puget Sound Energy bill with graph page showing your name, address, and usage graph for all of 2014; or 2014 signed lease/rental agreement(s);or have landlord complete the Landlord Form (request copy if needed).

☐ **Income documentation for 2014** – (i.e., 2014 check stubs or statements) needed for EVERY household member living with you in 2014 and for EACH income source that was checked "yes" in Question #13 above. (See Guidelines under "Required Documentation" for further detail.)

☐ **Proof of Permanent Disability** – if applicable, provide benefit verification statement showing that you are entitled to disability benefits (along with documentation of disability income payments received from SSA, SSI, SSDI, or V.A. during 2014).

IMPORTANT INFORMATION – PLEASE READ BEFORE SIGNING

I, the undersigned, under penalty of perjury of the laws of the state of Washington do hereby declare and certify:

- ***That I have read and understood all of the 2014 Utility Tax Relief Program Guidelines for Tax Rebate (10/1/2014) provided with this application, and that all of the information provided by me on this application is accurate, complete, and true to the best of my knowledge.***
- ***That I understand that submitting the required documentation does not guarantee eligibility to the program. Such information will, however, be used to determine if I qualify for benefits under the program.***
- ***That I understand that the income documents I provided will be used by the City to create an income worksheet that will be used to determine income qualification.***
- ***That I have read the definition of "disposable income" for the program and to the best of my knowledge, I and my household are eligible for the program.***
- ***That I have provided a true and accurate list of "disposable income" to the City for 2014.***
- ***That I understand the tax rebate is for 2014 only and it is my responsibility to re-apply for this or any other rate relief program during application periods for those programs.***
- ***That I understand that any attempt to falsify my information will result in my disqualification from the program for this year and may subject me to further civil or criminal penalties.***
- ***That I understand that if I receive the tax rebate and do not disclose all sources of disposable income for household members for 2014, the City may recover the actual cost of my tax rebate for the period that I was not eligible.***

Signed this _____ day of _____, 2014 in _____
Day Month Insert Place of Signing

Applicant Signature* _____

Applicant Signature* _____

* If signing for an applicant, you MUST provide a copy of the Power of Attorney authorizing you to do so.

How to Apply

1. Collect the required identification, residency, and income documents. Applications submitted without complete documentation cannot be processed.
2. Fill out the application, read the "Important Information" statement, and sign and date the application.
3. Turn in completed and signed application to Bellevue Utilities at downtown Bellevue City Hall by 5:00 p.m., PST, on Thursday, November 20, 2014. Late or incomplete applications cannot be processed.
   - If you are applying for the first time or you did not qualify for the program last year (2013), you MUST schedule an application appointment by calling 425-452-5285 and apply in person.
   - If you qualified for this program in 2013, you may return your application by mail to: City of Bellevue Utilities, PO Box 90012, Bellevue, WA 98009-9012.