



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

---

October 1<sup>st</sup>, 2015

Dear Applicant:

The City of Bellevue's **2015 Utility Tax Relief Program for low-income households** will be accepting appointments and processing applications for this year's program from October 1<sup>st</sup> through November 19<sup>th</sup>, 2015. Remember, even if you have been in the program in the past, you need to re-apply every year. Please note: It can take 6-8 weeks to process an application. Applicants are encouraged to get their applications in as early as possible to ensure timely processing.

This packet contains two items:

- Program Guidelines – 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, signed, dated and returned with required documentation.

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

- In Person – If you are applying for the first time or you were not approved for this program last year (2014), you must schedule an application appointment by calling 425-452-5285 and apply in person.
- By Mail – If you were in the program in 2014, you may apply by mail. Be sure to sign and date the application and include copies all required identification, income, and residency information when returning your paperwork. 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.

Whether you apply in person or by mail, **all required documentation must be received at the downtown Bellevue City Hall before 4 p.m., PST, on Thursday, November 19<sup>th</sup>, 2015.** If you have any questions, please call 425-452-5285.

Sincerely,

*Patricia Burgess*

Patricia Burgess, Program Administrator  
Utility Rate & Tax Relief Programs  
City of Bellevue Utilities  
425-452-5285



**City of Bellevue**  
**Utility Tax Relief Program**  
P.O. Box 90012, Bellevue, WA 98009  
Email: [utilityrelief@bellevuewa.gov](mailto:utilityrelief@bellevuewa.gov)  
Phone: (425) 452-5285 Fax: (425) 452-7669

## **PROGRAM GUIDELINES FOR 2015 UTILITY TAX RELIEF PROGRAM**

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 qualified applicants who apply for the program in a complete and timely manner.

### **Application Period**

Applications for the 2015 Tax Relief Program will be accepted October 1st through November 19th, 2015. The deadline for applying is Thursday, November 19th, 2015 at 4 p.m., PST. Completed applications and copies of all required documentation must be received at downtown Bellevue City Hall before the deadline to be considered. Please note: It can take 6-8 weeks to process an application. Applicants are encouraged to get their applications in as early as possible to ensure timely processing.

### **Program Eligibility**

To be eligible, you must have lived inside the Bellevue service area for at least one calendar month in 2015, provide a utility bill in your name and qualify as low-income. To be considered low-income, your total annual combined household income\* for 2015 must not exceed the limits shown below.

Number of People in Household:	2015 Household Income* Must Not Exceed:
1	\$30,860
2	\$35,280
3	\$39,700
4	\$44,100
5	\$47,610
6	\$51,190

\* 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 2015. Examples of income and required documentation are described in the "Required Documentation" section that follows.

### **How to Apply**

1. Fill out the application, read the "Important Information" statement and sign and date the application.
2. Collect the required documents from the "Required Documentation" list that follows.
3. Turn in the completed application with copies of required documentation before 4 p.m., PST, on Thursday, November 19<sup>th</sup>, 2015. Late or incomplete applications cannot be processed.
  - a. If this is your first time applying or you did not qualify last year (2014), you must schedule an application appointment by calling 425-452-5285 and apply in person.
  - b. If you qualified for this program last year (2014), you may return your application by mail to: City of Bellevue Utilities, PO Box 90012, Bellevue, WA 98009-9012

**NOTE:** If you qualified for the 2015 Utility Rate Relief Program, you do not need to complete this application. Your qualification in that program also qualifies you for the 2015 Utility Tax Relief Program. You will receive a tax rebate check without additional paperwork.

(Continues on reverse side)

## Required Documentation

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

- A. Proof of 2015 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 2015 showing the direct deposits of the income.
- Salary/Wages/Tips, etc. (Provide the three (3) most recent 2015 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 2015
- B. Identification is REQUIRED for all household members in 2015. 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. Please **DO NOT SEND ORIGINALS**. We cannot guarantee their safety. Note: Social Security Cards are no longer being used for identification purposes.
- C. Proof of Residency is REQUIRED. Show proof of living within the Bellevue Utility service area in 2015 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 2015; or 2015 signed lease(s)/rental agreement(s); or have landlord complete the Landlord Form (request copy if needed).
- D. Proof of Permanent Disability – If you and/or any other member of your household are permanently disabled, you must provide a benefit verification statement from Social Security and/or Veterans' Administration specifically stating that recipient is entitled to and is receiving "disability" benefits in 2015.

### 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. If your application is approved, your rebate check will be processed. Qualified applicants will be sent a rebate check to the address on the application. If your application is denied, you will be notified by mail. Applicants must promptly notify Bellevue Utilities if there is a change of address.

### When will I get my tax rebate check?

The tax rebate check for all approved applicants will be processed and mailed at the end of December 2015.

### How much will the tax rebate be?

This year's rebate will be approximately \$100. If you resided in the Bellevue service area for only part of 2015, you will receive a pro-rated rebate.

### Questions?

If you have any questions or require further assistance, please contact our office at 425-452-5285.



**APPLICATION CHECK LIST - 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 2015. 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 2015** – 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 2015; or 2015 signed lease(s)/rental agreement(s); or have landlord complete the Landlord Form (request copy if needed).
- Income documentation for 2015** – (e.g., 2015 check stubs or statements) Documentation is needed for EVERY household member living with you in 2015 and for EACH income source that was checked "yes" in Question #13 on previous page. (See Guidelines under "Required Documentation" for details.)
- Proof of Permanent Disability** – if applicable, provide a benefit verification statement from Social Security and/or Veterans' Administration showing that you or other member(s) of your household are entitled to "disability" benefits in 2015 (along with documentation of disability income payments received from SSA, SSI, SSDI, or V.A. during 2015).

**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 2015 Utility Tax Relief Program Guidelines for Tax Rebate (10/1/2015) 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 2015.*
- *That I understand the tax rebate is for 2015 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 2015, the City may recover the actual cost of my tax rebate for the period that I was not eligible.*

Signed this \_\_\_\_\_ day of \_\_\_\_\_, 2015 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. Fill out the application, read the "Important Information" statement and sign and date the application.
2. Collect the required identification, residency, income documents and permanent disability documentation (if applicable). Applications submitted without complete documentation cannot be processed.
2. Turn in completed and signed application with required documentation to Bellevue Utilities at downtown Bellevue City Hall by 4:00 p.m., PST, on Thursday, November 19th, 2015. 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 (2014), you MUST schedule an application appointment by calling 425-452-5285 and apply in person.
  - If you qualified for this program in 2014, you may return your application by mail to: City of Bellevue Utilities, PO Box 90012, Bellevue, WA 98009-9012.