



GUIDELINES FOR UTILITY TAX RELIEF

NOTE: If you qualified for the 2019 Utility Rate Relief Program earlier this year, you do not need to complete this application.

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 2019 Tax Relief Program will be accepted October 1st through November 15th, 2019. The **deadline for applying is Friday, November 15th, 2019, at 4 p.m., PST.** Completed applications and copies of all required documentation must be received at Downtown Bellevue City Hall or Crossroads Mini City Hall before the deadline to be considered. Late or incomplete applications cannot be processed. It can take several 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 2019, have contributed to the payment of city utility services, and qualify as low-income. To be considered low-income, your total annual combined household income* for 2018 must not have exceeded the limits shown below.

Household Size in <u>2018</u>	Total Household Income* for <u>2018</u>
1 person	\$37,450
2 persons	\$42,800
3 persons	\$48,150
4 persons	\$53,500
5 persons	\$57,800
6 persons	\$62,100

* Income means "disposable income," as that term is defined in RCW 84.36.383, plus all disability compensation and any and all gifts. Total household income includes income for everyone living in your household during 2018. 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 Friday, November 15th, 2019. Late or incomplete applications cannot be processed.
 - If you qualified for this program last year (2018), you may return your application by mail to:
City of Bellevue Utilities, P.O. Box 90012, Bellevue, WA 98009-9012
 - If this is your first time applying or you did not qualify last year (2018), you must schedule an application appointment by calling 425-452-5285 and apply in person.

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REQUIRED DOCUMENTATION

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

- Proof of 2018 income. Please provide photocopies of completed and signed 2018 Tax Return(s) and other 2018 statements/documentation for EVERY person living with you in 2018 and for ALL income sources that applied to your household during 2018. Some examples of household income include, but are not limited to:
 - Salary/Wages/Tips, etc. (W-2)
 - Interest/Dividends (1099-INT/1099-DIV)
 - Alimony/Spousal Maintenance (State/DSHS stmts.)
 - Business Income, include rental property income and/or rental pymts. co-tenant (1040 + Sch. C)
 - Capital Gains/Losses (1040 + Sch. D)
 - IRA withdrawal (1099-R)
 - Pension/Veteran's/Annuities (1099-R)
 - Railroad Retirement Benefits (RRB-1099)
 - Unemployment/Labor and Indus. (1099-G)
 - Social Security Statement (SSA, SSI, SSDI 1099)
 - Gifts/Cash
 - Work Study Earnings
 - Military pay/benefits
 - Other
- Identification is REQUIRED for all household members in 2018. Valid, government-issued 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 not accepted for identification purposes.
- Proof of Residency is REQUIRED. Show proof of living within the Bellevue Utility service area in 2019 with a 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 2019; or 2019 signed lease(s)/rental agreement(s); or have landlord complete the Landlord Form (request copy if needed).

FREQUENTLY ASKED QUESTIONS

1. 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.**

2. 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 2019.

3. How much will the tax rebate be?

This year's rebate will be \$119. If you have resided in the Bellevue service area for only part of 2019, you will receive a prorated rebate.

4. Additional Questions?

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



For alternate formats, interpreters, or reasonable accommodation requests please phone at least 48 hours in advance 425-452-5285 (voice) or email UtilityRelief@bellevuewa.gov. For complaints regarding accommodations, contact City of Bellevue ADA/Title VI Administrator at 425-452-6168 (voice). If you are deaf or hard of hearing dial 711. All meetings are wheelchair accessible.



City of Bellevue UTILITY TAX RELIEF APPLICATION 2019

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

OFFICE:
Date Rec'd: _____
Date Comp: _____
Signature: _____

OFFICE USE ONLY				
PIN:	INCOME:	F or P:		
CIS CYCLE:		BATCH:		
MONTHS (1-12):		START DATE EXCEPTION:		
		<input checked="" type="checkbox"/> TX		
Check:				
<input type="checkbox"/> Incl List	<input type="checkbox"/> Signature	<input type="checkbox"/> Income	<input type="checkbox"/> ID/Age	<input type="checkbox"/> Residency

- Applicant's Legal Name (print): _____

LAST NAME
FIRST NAME
- Birthdate: _____ Last 4 digits of SSN: _____
- Current address of your Primary Residence: _____
- Current mailing address (if different): _____
- Name of apartment/condo complex (if applicable): _____
- Phone (with area code): _____ Email address: _____
- Do you: Own house/condo Rent house/condo/apartment
- Did you qualify for this program in 2018? Yes No If no, call for appointment to submit application.
- Have you lived in Bellevue since January 2019? Yes No
 If No, when did you move to Bellevue? _____
- Did you contribute to the payment of utility bills from your own resources in 2019? Yes No
- How many people (excluding you) lived in your household in **2018**? _____ Print the names of each person below:

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

12. Did anyone living in the household in 2018 have income in 2018 from any of the sources below? Check the 'YES' or 'NO' box for each section below and provide documentation* to verify all sources of 2018 income.

Y N

	Salary/Wages/Tips, etc. (W-2)
	Interest & Dividends 1099-INT/1099-DIV)
	Alimony/Spousal Maintenance (State/DSHS Stmts.)
	Capital Gains/Losses (1040 + Sch. D)
	Business Income, include rental income and/or rental payments from co-tenant (1040 + Sch. C)
	IRA withdrawal (1099-R)
	Pension/Veteran's Benefits/Annuities (1099-R)
	Railroad Retirement Benefits (RRB-1099)

Y N

	Unemployment/Labor and Industries (1099-G)
	Social Security (SSA, SSI, SSDI, 1099 Stmts.)
	Work Study Earnings (School Stmts.)
	Gifts/Cash – Explain:
	Military pay/benefits
	Other income for 2018:
	Did you/member(s) of household file a 2018 Tax Return? Provide copy of signed 1040 with all attachments.

* If unable to provide income documentation from original source, provide copies of bank statements for all 2018 showing the direct deposits of the income.

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 2018. 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 2019** – 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 2019; or 2019 signed lease(s)/rental agreement(s); or have landlord complete the Landlord Form (request copy if needed).
- Income Documentation for 2018** – Documentation is needed for EVERY household member living with you in 2018 and for EACH income source that was checked "yes" in Question #12. (See Guidelines under "Required Documentation" for details.)

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, and income documents. Applications submitted without complete documentation cannot be processed.
2. Turn in completed and signed application with required documentation to Downtown Bellevue City Hall or Crossroads Mini City Hall **by 4:00 p.m., PST, on Friday, November 15th, 2019.** Late or incomplete applications cannot be processed.
 - If you qualified for this program in 2018, please return your application by mail to: City of Bellevue Utilities, PO Box 90012, Bellevue, WA 98009-9012.
 - If you are applying for the first time or you did not qualify for the program last year (2018), you **MUST** schedule an application appointment by calling 425-452-5285 and apply in person.

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 2019 Utility Tax Relief Program Guidelines for Tax Rebate (10/1/2019) 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 2018.
- That I understand the tax rebate is for 2019 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 the City reserves the right to audit my records to determine my eligibility for the program.
- That I understand that if I receive the tax rebate and do not disclose all sources of disposable income for household members for 2018, the City may recover the actual cost of my tax rebate for the period that I was not eligible.

Signed this _____ day of _____, 2019 in _____
Day Month Insert Place of Signing

Applicant Signature* _____

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



For alternate formats, interpreters, or reasonable accommodation requests please phone at least 48 hours in advance 425-452-5285 (voice) or email UtilityRelief@bellevuewa.gov. For complaints regarding accommodations, contact City of Bellevue ADA/Title VI Administrator at 425-452-6168 (voice). If you are deaf or hard of hearing dial 711. All meetings are wheelchair accessible.

Office Use Only

Approved/Disapproved: _____ Date: _____

Verified: _____ Date: _____

DISC Update - Initial: _____ Verified: _____

Application Denied: Over Income Doesn't Qualify Incomplete Paperwork Other: _____
Logged Denied Added to 2020 mailing list

Office Notes: