



Updated
6/17/2008

City of Sierra Madre

ANNUAL APPLICATION FOR UTILITY USER'S TAX EXEMPTION

PLEASE PRINT CLEARLY- FRONT AND BACK OF FORM

Name: Last	First	M.I.	
Service Address:			Zip Code

UTILITY INFORMATION

UTILITY	ACCOUNT #.	Name on Account
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		

PROOF OF ANNUAL HOUSEHOLD GROSS INCOME MUST BE PROVIDED
SEE BACK OF FORM

Number of of persons in household:	Adults	+	Minors	=	Total	Total combined annual household income:
	<input type="text"/>		<input type="text"/>		<input type="text"/>	\$ <input type="text"/>

CERTIFICATION

I certify (or declare) under penalty of perjury, that:

1. I am a user of the utilities shown hereon at premises occupied by myself.
2. The combined gross income of all members of the household in which I reside is less than the amounts shown on the attachment, for my total household size.
3. I will notify the City of Sierra Madre within 10 days of any changes, which could affect my eligibility for this exemption.
4. I understand that this exemption is valid until July of each year, at which time I will need to reapply. (It is recommended that you reapply in April or May to minimize any lapse in eligibility.)
5. I, the undersigned, hereby claim exemption from the utility users tax imposed by Ordinance No. 1275.

DATE:	Signature:
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DO NOT WRITE BELOW THIS LINE

Date Received:	Exemption authorized by:	Date sent to service suppliers:
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Note: This exemption will not take effect until the application has been verified and approved by the Tax Administrator and processed by the utilities. The City has 30 days to process your request. The utilities have 60 days from receiving notification from the City, to remove the tax from your bill. If you do not receive the exemption after 90 days please return to the City of Sierra Madre, with a copy of your bills, as you may be eligible for a UUT refund.

It is a misdemeanor for any person to knowingly receive the benefits of the exemptions when the basis for the exemption does not exist or ceases to exist. It is your responsibility to notify the City, within 10 days, if there is a change in fact or circumstance which might disqualify them from receiving the exemption.

DOCUMENTATION REQUIRED

1. A copy of your most recent utility bills.
2. A copy the, State or Federal Tax returns for everyone residing at the household; if tax forms were not filed, please attach Social Security statements, or 3 months bank statements, or 3 months pay stubs, for each household member.
3. A copy of California ID or Driver's License, or other comparable form of identification, for each adult at the residence.

CALCULATION OF TOTAL COMBINED HOUSEHOLD INCOME

Name	Annual Gross Income	Source of Income (Documentation must be attached)
1.		
2.		
3.		
4.		
5.		
6.		
7.		
8.		
TOTAL	\$	

Attach additional forms if necessary.

EXPLANATION OF GROSS INCOME

Proof of "gross household income" must be submitted with your application. Gross income is all household income before taxes, from all sources, both taxable and nontaxable, for all people who live in the residence. This includes, but is not limited to:

- Wages or Salaries
- Bonuses, tips
- Gross amounts of pensions and/or annuities
- Interest or Dividends from savings accounts, stocks/bonds or retirement accounts
- Retirement benefits
- Social security, SSI, SSD
- Unemployment Benefits
- Prior year's income tax refunds
- Disability Payments
- Life insurance benefits
- Capital gains
- Inheritances
- Child support
- AFDC
- Foster care payments
- Worker's Compensation
- Insurance Settlements
- Legal settlements
- Cash
- Spousal support, Alimony
- TANF
- Other support

Return completed application form and attachments to: City of Sierra Madre, Administrative Services Department 232 W. Sierra Madre Blvd. Sierra Madre, CA 91027	Questions? Call: Administrative Services (626) 355-7135
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