Submit 2019 income

City of Oakland
SPARE - Special Assessment Refunds and Exemptions
150 Frank H. Ogawa Plaza, Suite 5342
Oakland, CA 94612

SPARE@OaklandCA.gov
☏ (510) 238-2942
TDD (510) 238-3254

SPECIAL ASSESSMENT EXEMPTION APPLICATION FOR 2020-2021 PROPERTY TAX

➔ ➔ ➔ APPLICATION MUST BE RECEIVED BY MAY 15, 2020 ← ← ←

To qualify for a "very low income" exemption, please complete the following (see reverse for directions):

1. Be the owner-occupant(s) of the property.

Last Name	First Name	Middle	Email Address

Parcel Number	Address
	Oakland, CA 946 _____

2. Under the column of Income Source below, include all sources of income received in **2019**, including salaries, wages, Social Disability, AFDC, business earnings, etc. Supporting documentation must be submitted.

Resident Name	Age	Relationship	**2019** Income Amount	Income Source	Verification Document
		Head of Household			
Total Number of Residents =		Total Income: $			

3. Have the following Special Assessment Districts on Property Tax Statement:

LLAD (CITY LANDSCP/LIGHT)
Measure O (CITY LIBRARY SERV)
Measure Z (VIOLENCE PREV TAX)
Measure D (CITY LIBRARY SRV-D)✳

4. Have a combined family income from all sources (taxable and non-taxable income) in **2019** not exceeding the levels defined as very low income according to the U.S. Housing Urban Development. **Very Low Income** levels for the City of Oakland are shown in the table to the right.

✳For individuals 65 years of age and over, on or prior to July 1, 2020 (submit proof of age), a refund for **Measure D ONLY** may be possible, if total household income does not exceed the **Low Income** level per U.S. Housing and Urban Development in the table to the right.

Number in Household	**Very Low Income** Combined **2019** Household Income	✳**Low Income** Combined **2019** Household Income
1	$43,400	$69,000
2	$49,600	$78,850
3	$55,800	$88,700
4	$61,950	$98,550
5	$66,950	$106,450
6	$71,900	$114,350

5. I declare under penalty of perjury that I own and live in the dwelling for which I am requesting a special assessment exemption; that the income stated above is the total income for my household, and that all information provided herein is true to the best of my knowledge. I understand that if any of the above information is found to be untrue, I may forfeit my eligibility. I further understand that this form may be subject to an audit, verification check, and possible denial of the exemption. I hereby authorize the City of Oakland to verify all the information herein provided.

Owner's Name	Owner's Signature	Date	Phone Number

Co-Owner's Name	Co-Owner's Signature	Date	Phone Number

Submit application to address at top of page | Check application status https://www.oaklandca.gov/services/spare

Directions for filling out the special assessment exemption application

Submit exemption application as soon as possible. 2020-2021 property tax does not need to be paid prior to submission of exemption application. If exemption application is approved, special assessments are removed from property tax statement so that a refund check does not need to be issued.

1. To qualify for the exemption, you must be the owner and occupant of the property. Please fill in your last, first and middle name, along with the parcel number and address. The potential amount of the exemption will depend on the type of property shown in the table below.

Use Code as defined by Alameda County	Potential Exemption
Single Family Home	100%
Duplex	50%
Triplex	33%
Fourplex	25%
Five Units+	Not Eligible

2. Examples of supporting documentation include income tax returns, payroll stubs, social security benefit letters, rent receipts and other award letters. All taxable and non-taxable income is included in the combined household income.

Property Tax Year	Income Required
2020-2021 1st Installment Nov 1, 2020 (Due Dec 10, 2020) 2nd Installment Feb 1, 2021 (Due Apr 10, 2021)	**2019** Income

If submitting individual income tax return, attach a copy of pages 1 and 2.
If individual income tax return has a value on Line 7a, submit Schedule 1.
If Schedule 1 has a value on Line 3, attach a copy of Schedule C.
If Schedule 1 has a value on Line 5, attach a copy of Schedule E.

Information for No-Income Affidavit.
If a household member is age 18 and over and has no income, a No-Income Affidavit must be included.
If a household member is age 26 or younger and is listed as a dependent on the individual tax return, a No-Income Affidavit does not need to be included.

No-Income Affidavit can be downloaded at:
https://www.oaklandca.gov/documents/special-assessment-no-income-affidavit

3. The special assessments which may be eligible for an exemption on Property Tax Statement:

LLAD (CITY LANDSCP/LIGHT)	Measure Z (VIOLENCE PREV TAX)
Measure O (CITY LIBRARY SERV)	Measure D (CITY LIBRARY SRV-D)

4. From item 2, total the number of residents and total the combined household income (taxable and non-taxable income) to check against the **Very Low Income** Combined 2018 Household Income table on application page.

✳ For individuals 65 years of age and over, on or prior to July 1, 2020 (submit proof of age), a refund for **Measure D ONLY** may be possible, if total household income does not exceed the **Low Income** level per U.S. Housing and Urban Development, see table on application page.

5. Be sure to print name, sign, provide contact information and date the application. If a co-owner is listed on the property they must print their name, sign, provide contact information and date the application.

6. Check application status online https://www.oaklandca.gov/services/spare

Submission of documents does not guarantee approval. Additional documentation may be requested.