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Finance & Management Agency
Revenue Division

(510) 238-6118/ FAX (510) 238-6431
TDD (510) 238-3254

EXEMPTION REQUEST FOR OWNERS OF LOW INCOME HOUSING TAX-CREDIT FINANCED AFFORDABLE HOUSING DEVELOPMENTS.

To receive consideration for the exemption, a claimant must complete and file this form with the Business Tax office by November 1st. A separate claim form is required for each location.

Business Tax Account # _____

Ownership Name:

Property Address:

City, State, Zip:

I hereby petition for an exemption from the business tax under Oakland Municipal Code 5.04.630 Exemption for Nonprofit Corporation, Association, Etc. - Exemption for Owners of Low Income Housing Tax-Credit Financed Affordable Housing Developments. Please check all that apply:

- checkbox The owner of the affordable housing project has received federal and/or state low income housing tax credits in connection with the affordable housing ownership.
checkbox The property is owned and operated by a partnership in which the managing partner is an eligible nonprofit corporation or limited liability company. Please list the name and address of the managing partner. Name: Address: City, State, Zip:
checkbox The property qualifies for the property tax exemption.
checkbox The following documents are attached to this exemption request to support the validity of this claim:
checkbox Business Tax Renewal Declaration
checkbox BOE 267-A AND BOE 267-L
checkbox Rent roll
checkbox Income Statement
checkbox Federal Income Tax Return

A VALID CLAIM MUST INCLUDE ALL SUPPORTING DOCUMENTS

NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)

DAYTIME PHONE NUMBER

I certify (or declare) under penalty of perjury that all information contained herein, including any accompanying statements or documents, is true, correct, and complete to the best of my knowledge and belief.

SIGNATURE OF CLAIMANT

TITLE

DATE

E-MAIL ADDRESS

Submit this form along with the documents listed above to audit@oaklandca.gov

For Office Use Only:

Initials

Approved: checkbox Granted checkbox Pending checkbox Denied
Reason:

Date Received: