

Submit 2021 income



City of Oakland

SPARE - Special Assessment Refunds and Exemptions
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SPECIAL ASSESSMENT REFUND APPLICATION FOR 2022-2023 PROPERTY TAX

→ → → BOTH 2022-2023 PROPERTY TAX INSTALLMENTS MUST BE PAID BEFORE A REFUND CAN BE ISSUED ← ← ←

To qualify for a full to partial refund, please complete the following (see reverse for directions):

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

Last Name	First Name	Middle Name	Email Address

Parcel Number	Address
	Oakland 946 _____

2. Under the column of Income Source below, include all sources of income received in **2021**, including salaries, Social Security, Disability, AFDC, business earnings, etc. Supporting documentation must be submitted.

Resident Name	Age	Relationship	2021 Income Amount	Income Source	Verification Document
		Property Owner			
Total Number of Residents =		Total Income: \$			

3. Have a combined family income from all sources (taxable and non-taxable income) in **2021** not exceeding the levels defined in the table below according to the U.S. Housing Urban Development and have the following Special Assessments on Property Tax Statement.

Number in Household	Very Low Income 50% 2021 Household Income	Very Low Income 60% 2021 Household Income	Low Income 80% 2021 Household Income
1	\$47,950	\$57,560	\$76,750
2	\$54,800	\$65,770	\$87,700
3	\$61,650	\$73,980	\$98,650
4	\$68,500	\$82,200	\$109,600
5	\$74,000	\$88,800	\$118,400
6	\$79,500	\$95,400	\$127,150
	LLAD (CITY LANDSCP/LIGHT) Measure Z (VIOLENCE PREV TAX) Measure O (CITY LIBRARY SERV) Measure D (CITY LIBRARY SRV-D) Measure Q (2020 OAK MEASURE Q)	Measure Q (2020 OAK MEASURE Q)	65 years of age and over, on or prior to July 1, 2022 Measure D (CITY LIBRARY SRV-D) Measure Q (2020 OAK MEASURE Q)

4. I declare under penalty of perjury that I own and live in the dwelling for which I am requesting a special assessment refund, 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 refund. 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

Directions for filling out the Special Assessment Refund Application

Both installments of 2022-2023 property tax need to be paid prior to submission of refund application. If refund application is approved, a refund check will be issued.

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

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

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

If submitting individual 1040 income tax return, attach a copy of pages 1 and 2, for 1040-SR also include page 3.

If you file a Schedule 1, submit Schedule 1.

If you file a Schedule C, submit Schedule C.

If you file a Schedule E, submit 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. Check the total number of residents and total combined household income (taxable and non-taxable income) against the **Very Low Income 50%/60%** Combined 2021 Household Income table on application page.
For individuals 65 years of age and over, on or prior to July 1, 2022 (**submit proof of age**-photo ID or birth certificate), an refund for **Measure D and Q only** may be possible, if total household income does not exceed the **Low Income 80%** level per U.S. Housing and Urban Development. See table on application page.
4. All persons who conduct business and/or rent property or rooms in the City of Oakland are required to register and pay for an annual business tax certificate in order to be approved for an refund. For further information: <https://www.oaklandca.gov/services/business-tax-applications-1>
5. Be sure to print name, sign and date the application, and provide contact information. If a co-owner is listed on the property deed, they must print their name, sign and date the application, and provide contact information.
6. Check application status online <https://www.oaklandca.gov/services/spare>

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