



2017/2018 Rates Rebate Application Form

Application for the rating year 1 July 2017 to 30 June 2018

APPLICATIONS CLOSE ON 30 JUNE 2018 AND CANNOT BE ACCEPTED AFTER THIS DATE

1. Name – You must be named on your local council’s rating information database.

| | |
|--|--|
| Last name | Mr/Mrs/Ms/Miss (circle) |
| First name | |
| Were you living at the property on 1 July 2017? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| Were you living with a spouse/partner* or joint home owner(s) on 1 July 2017? <i>*Partner is a person you are married to or with whom you are in a civil union or de facto relationship</i> | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| <i>If yes, please include their income details in section 4.</i> | |

2. Address – The property you pay rates for must be your principal place of residence.

You cannot claim a rates rebate for the rates payable on a property that is used principally for business, farming, commercial or industrial purposes, or a home that is not your usual place of residence.

| | |
|---|---|
| Street number and name | |
| Suburb and town | Postcode |
| Postal address (if different) | |
| Why is your postal address different? | |
| Best phone number | |
| Did you move to another address during this rating year? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If yes , on what date did you settle the sale of your previous property? |/...../..... |
| Amount of rates paid on your previous property for this rating year | \$..... |
| Did you receive any rebate on those rates? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If yes , how much? | \$..... |
| Do you earn money from home or run a business from home? | <input type="checkbox"/> Yes* <input type="checkbox"/> No |
| If yes , how? | |
| Do you own more than one property? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If yes , what type of property(ies) (including rental*)? | |
| <i>*Please include income details in section 4.</i> | |

| | |
|--|----------------------|
| TA Ref: Council use only | <input type="text"/> |
| Unique Property ID Council use only | <input type="text"/> |

3. Dependants

They must have been living with you on 1 July 2017. Your partner is not a dependant.

These are:

- children you care and provide for under the age of 18 on 1 July 2017 and who at this time were not married and for whom you were not receiving payments under section 363 of the Children, Young Persons, and their Families Act 1989
- relatives in receipt of a benefit (but not NZ Superannuation) on 1 July 2017.

| Last name | First name | Birth date | Benefit type (if applicable) |
|-----------|------------|------------|------------------------------|
| | | | |
| | | | |
| | | | |
| | | | |

4. Income Declaration – ‘Income’ means money received, before tax, for the year 1 April 2016 to 31 March 2017.

Satisfactory proof of income includes:

- income confirmation from Work and Income
- income confirmation from Inland Revenue
- investment earning statements for the tax year
- statement of earnings from your employer.

Additionally for self-employed people:

- a copy of your complete set of financial accounts, IR3B or IR10 you provided to Inland Revenue for the income year 1 April 2016 to 31 March 2017
- you cannot offset business losses against other income
- business losses should be entered as \$0.

Ratepayers who were living and earning overseas during part, or all, of the tax year should obtain income information from the country in which they were living. We recommend you use an exchange rate that reflects the average for the period for which overseas income is assessed. Exchange rates may be obtained from the Reserve Bank at www.rbnz.govt.nz.

In the table below, please show the **total income**, before tax, that you and your spouse/partner and/or joint homeowner received **for the tax year 1 April 2016 to 31 March 2017**. Please indicate your occupation and tick the relevant boxes to show the source(s) of your income.

- Jobseeker Self-employment Employment Occupation:
 Supported Living Sole Parent New Zealand Superannuation
 Other (please specify):

| Source of income | Your income | Partner/joint homeowner income |
|---|-------------|--------------------------------|
| Wages or salary | \$ | \$ |
| Work and Income benefits | \$ | \$ |
| Work and Income supplements (e.g. Accommodation Supplement) | \$ | \$ |
| New Zealand Superannuation | \$ | \$ |
| Personal superannuation | \$ | \$ |
| Interest / dividends | \$ | \$ |
| Overseas income (converted to \$NZ) | \$ | \$ |
| Net profit before tax from any business – enter ‘0’ if you sustained a loss | \$ | \$ |
| Rental income - enter ‘0’ if you sustained a loss | \$ | \$ |
| ACC earnings compensation | \$ | \$ |
| Trust income paid to you | \$ | \$ |
| Working for Families Tax Credits (excludes Family Tax Credits) | \$ | \$ |
| Income from other sources (please identify) | \$ | \$ |
| | \$ | \$ |
| Individual total | \$ | \$ |
| Total combined income | \$ | |

5. Rates – Refer to your 2017/18 rates notices to complete this section.

Show the total amount you pay for local, regional and water rates (if applicable) on your home. Your council will be able to help you with this information. 'Rates' does not include:

- the amount of any discount offered for early payment (this means deduct the amount of any discount whether or not you received the discount)
- any rates a court has told you to pay.

| | | | |
|------------------------|----|------------------|--|
| Local council rates | \$ | Council Use only | |
| Regional council rates | \$ | | |
| Council water rates | \$ | | |
| Total rates | \$ | | |

6. Important Information

Rates rebates are granted under the Rates Rebate Act 1973. You must provide the requested information on this form so your rebate can be worked out. Your council will process the application. You have the right to see this information, and have it corrected.

Section 14 of the Rates Rebate Act 1973

14. Offences

(1) Every person commits an offence who-

- for the purpose of obtaining any rates rebate under this Act, for himself or for any other person, makes any statement or declaration knowing it to be false in any particular, or wilfully misleads or attempts to mislead any person concerned in the administration of this Act or any other person whatsoever; or
- refuses or fails to comply with any requirement under section 11, or refuses or fails to answer any question put to him pursuant to that section, or knowingly gives any false or misleading answer to any such question.

(2) Every person who commits an offence against this Act is liable on conviction before a District Court Judge to imprisonment for a term not exceeding 12 months or to a fine not exceeding \$500, or to both.

7. Declaration

I
(name in full)

of
(residential address)

.....
(occupation)

solemnly and sincerely declare that I believe the information I have given on this form is true and correct, and I make this solemn declaration conscientiously believing the same to be true and by virtue of the Oaths and Declarations Act 1957.

.....
(signature of ratepayer - to be signed in the presence of an authorised person)

Declared at this day of 20

before me
(signature and printed name of person authorised to witness the declaration)

authorised council officer chartered accountant barrister/solicitor court registrar/deputy court registrar

Justice of the Peace minister of religion Member of Parliament

other authorised person (see below)

A number of people can authorise a declaration. To find a full list go to www.dia.govt.nz/ratesrebates or contact your council.

What next?

Please take this form to your council once completed. Council staff will work out your rebate and provide it to you. Note that applications close on 30 June 2018 and cannot be accepted after this date.



Applying for a rates rebate

The purpose of the Rates Rebate Scheme is to provide a subsidy to low income home owners on the cost of their rates. This application form is for a rates rebate for the 2017/2018 rating year; the period 1 July 2017 to 30 June 2018. The maximum rebate for this rating year is \$620 and applications close on 30 June 2018.

Am I eligible?

- I was a legal ratepayer for the property that was my home on 1 July 2017.
- I am applying for the 2017/2018 rating year, which runs from 1 July 2017 to 30 June 2018.
- I am not applying after the deadline, which is 30 June 2018.
- If you live in a retirement village or an owner-occupied flat read the information below.
 - » **Can people living in retirement villages apply?** In general, holders of a licence to occupy agreement are not eligible for a rebate as they do not meet the Scheme's requirements. However, retirement villages operate under a variety of tenure arrangements. Please check with your local council to determine if you are eligible to apply.
 - » **Can owners of owner-occupier flats apply?** An owner-occupier flat forms part of a group of two or more dwellings that are separately owned by the occupants, but built on a single rating unit. The rates are shared by the owners. If you are the owner of an owner-occupier flat, you might be eligible for a rebate. You will need to complete a separate rates rebate owner-occupier declaration form which can be obtained from your local council, or downloaded from www.dia.govt.nz/ratesrebates. Once completed, the owner-occupier declaration form should be handed to the council with this application form.

How much will my rebate be?

Your rebate is determined by the level of rates payable in the 2017/2018 rating year, and your household income. If you have dependants, your rebate entitlement is likely to be greater, up to the maximum of \$620. To check your entitlement, please refer to the table below or visit www.dia.govt.nz/ratesrebates and enter your details into the **rebate calculator**.

Rates rebate income eligibility table for households with no dependants. Please note that table values are an estimate only and do not guarantee your entitlement. You will still need to go and see your local council for the rebate to be determined.

| Household Income | Level of Rates | | | | | | | | | | | |
|------------------|----------------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|----------|
| | \$1,200 | \$1,400 | \$1,600 | \$1,800 | \$2,000 | \$2,200 | \$2,400 | \$2,600 | \$2,800 | \$3,000 | \$3,200 | \$3,500 |
| \$24,000 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$25,000 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$26,000 | \$542.33 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$27,000 | \$417.33 | \$550.67 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$28,000 | \$292.33 | \$425.67 | \$559.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$29,000 | \$167.33 | \$300.67 | \$434.00 | \$567.33 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$30,000 | \$42.33 | \$175.67 | \$309.00 | \$442.33 | \$575.67 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$31,000 | - | \$50.67 | \$184.00 | \$317.33 | \$450.67 | \$584.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$32,000 | - | - | \$59.00 | \$192.33 | \$325.67 | \$459.00 | \$592.33 | \$620.00 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$33,000 | - | - | - | \$67.33 | \$200.67 | \$334.00 | \$467.33 | \$600.67 | \$620.00 | \$620.00 | \$620.00 | \$620.00 |
| \$34,000 | - | - | - | - | \$75.67 | \$209.00 | \$342.33 | \$475.67 | \$609.00 | \$620.00 | \$620.00 | \$620.00 |
| \$35,000 | - | - | - | - | - | \$84.00 | \$217.33 | \$350.67 | \$484.00 | \$617.33 | \$620.00 | \$620.00 |
| \$36,000 | - | - | - | - | - | - | \$92.33 | \$225.67 | \$359.00 | \$492.33 | \$620.00 | \$620.00 |
| \$37,000 | - | - | - | - | - | - | - | \$100.67 | \$234.00 | \$367.33 | \$500.67 | \$620.00 |
| \$38,000 | - | - | - | - | - | - | - | - | \$109.00 | \$242.33 | \$375.67 | \$575.67 |
| \$39,000 | - | - | - | - | - | - | - | - | - | \$117.33 | \$250.67 | \$450.67 |
| \$40,000 | - | - | - | - | - | - | - | - | - | - | \$125.67 | \$325.67 |
| \$41,000 | - | - | - | - | - | - | - | - | - | - | - | \$200.67 |
| \$42,000 | - | - | - | - | - | - | - | - | - | - | - | \$75.67 |

Rates Rebate

QUESTIONS: If you have any questions about the Scheme contact your council or visit www.dia.govt.nz/ratesrebates