CITY HALL – FINANCE DEPT.
33325 8th Avenue South
Federal Way, WA 98003-6325
253 835-2526
www.cityoffederalway.com

Federal Way 2016 Utility Tax Rebate Program

Dear Federal Way Citizen,

We invite you to participate in the Federal Way 2016 Utility Tax Rebate program for low-income seniors, and/or low-income disabled citizens. Our records show that you have either requested an application for the program, or participated in prior years. Please contact us if you wish to have your name removed from our list.

In this letter you will find the instructions, forms proving your eligibility, and an application for the program. Your name and address are preprinted on the forms; however, if any of the information is incorrect, please make the necessary corrections on your application before submitting.

You may contact us at:

Federal Way City Hall
Finance Department
33325 8th Avenue South
Federal Way, Washington 98003-6325

OR,

You can call the City of Federal Way Utility Tax Rebate Line at **253-835-2526**. Our regular business hours are Monday – Friday 8:00 a.m. – 5:00 p.m. If we miss your call, please leave a message with your name and phone number, and we will return your call as soon as possible.

Thank you,
Adé Ariwoola
Finance Director

Very low-income Federal Way senior citizens may qualify for a rebate of the utility taxes they paid in **2016**.

WHO IS ELIGIBLE?

You are eligible if you can answer **yes to all** of the following questions:

You lived within the incorporated limits of the City of Federal Way in 2016......	❑YES	❑ NO
You paid household utilities, which are in your name in 2016.......................	❑YES	❑ NO
You were at least 65 years old in 2016..	❑YES	❑ NO
The annual gross income of your household in 2016 did not exceed the following:	❑YES	❑ NO

People in Household	Maximum Annual Income
1	$31,650
2	$36,150
3	$40,650
4	$45,150
5 or more	Please call 253-835-2526

WHAT IS THE DEFINITION OF SENIOR CITIZEN FOR THIS PROGRAM?

Any person aged 65 and older. Citizens who turned 65 in 2016 may receive a rebate based on the time they met the age requirement. (i.e. if you turned 65 in May, you will be eligible to receive a rebate for your May – December utility taxes)

WHAT IS GROSS HOUSEHOLD INCOME?

This is the income received in the 2016 tax year by EVERY member of your household (related or not) who was at least 18 years old. This includes, but is not limited to: **wages, salaries, bonuses, tips, gross amounts of pensions and annuities, retirement benefits, Social Security benefits (SS), life insurance benefits, interest, capital gains, gifts, inheritances, third-party income, and other assets.**

WHAT DOCUMENTS ARE REQUIRED TO PROVE INCOME?

For all members of your household with an income we require:

- A U.S. Individual Tax Return Form 1040 (if one was filed); **or**
- Bank statements for November and December 2016 (if no income tax return was filed); **and**
- Documentation for all sources of income not included in bank statements or on IRS Form 1040.

WHAT OTHER DOCUMENTATION MUST BE PROVIDED?

- Fully completed Low-Income Senior Citizen Utility Tax Rebate Application Form (Page 5).
- All original or copies of bills paid in 2016:
    - To prove payments of bills paid in December 2016 provide January and/or February 2017 bills shown as paid or a bank statement proving payment.
    - Original or copies of bills need to include taxes paid detail to be eligible for payment.
- Include bills for the following utilities only:
    - Gas and/or Electric; Telephone; Garbage; Cell Phone; Cable Television
    - Lakehaven Utility District **does not** collect city tax

You must include EVERY page of each month's bill so we may determine the amount of the rebate due.

- Please **paperclip** all pages of the bill together in order to ensure accurate, prompt processing of your rebate (i.e. all pages of January's phone bill clipped together, all pages of February's phone bill together, etc.). *Failure to submit your invoices in an organized manner could result in your application being returned.*

INCOMPLETE SUBMITTALS WILL BE RETURNED WITHOUT PROCESSING AND MUST BE RESUBMITTED TO OUR OFFICES BEFORE THE APRIL 28, 2017 DEADLINE.

WILL THE CITY RETURN MY INCOME DOCUMENTS AND UTILITY BILLS?

YES! Once your rebate is completely processed, all of your documents will be returned to you (except the application form). We are happy to mail them or you may arrange to pick them up at City Hall – whichever is easiest for you! Please refer to question #3 on the application to indicate which you prefer.

WHEN SHOULD I EXPECT TO RECEIVE MY TAX REFUND CHECK?

Rebate applications are processed in the order of which they are received. To expedite your refund, please follow the directions outlined and submit an orderly packet. Incomplete applications will be sent back and delay any potential refund. Due to staff reductions and additional responsibilities, the processing time is expected to take 6 weeks or longer from the time you submit your completed packet.

WHEN ARE APPLICATIONS ACCEPTED?

Applications will be accepted Tuesday, January 3 through Friday, April 28, 2017. Applications received after this deadline will not be processed and will be returned to applicant.

Applications can be dropped off or mailed to Federal Way City Hall:

Physical Address and Mailing Address are the same:

Finance – Federal Way City Hall
33325 8th Avenue South
Federal Way, Washington 98003-6325

QUESTIONS OR COMMENTS?

We are here to help you! Please contact the City of Federal Way Utility Tax Rebate Line at 253-835-2526. Our regular business hours are Monday – Friday 8:00 a.m. – 5:00 p.m. However, if we miss your call, please leave a message with your name and phone number and your call will be returned.

THANK YOU!

2016 Low-Income Senior Citizen
UTILITY TAX REBATE APPLICATION

1. **Applicant Information:**

Name: ______________________________ Phone: ____________

Address: ______________________________ Birthdate: ____________

____

____

List all other people in household. Use additional sheets if needed.

Name: ______________________________ Birthdate: ____________

Name: ______________________________ Birthdate: ____________

Name: ______________________________ Birthdate: ____________

2. **Documentation:**

In support of your application for a utility tax rebate you **MUST** include copies of:

PROOF OF INCOME
(for ALL household members with an income)

If you **did** file a 2016 tax return, provide:
❑ Complete copy of 2016 tax return; **AND**
❑ Documentation for all other income

OR

If you **did not** file a 2016 tax return:
❑ Bank statements from Nov & Dec 2016; **AND**
❑ Documentation for all other income not included in the bank statements

Provide all documents listed based on your tax filing status

3. **Please indicate how you would like your documents** (and check for those who qualify) **returned:**

❑ Please mail to me.

❑ I will pick up at City Hall

4. **Declaration:**

I, ______________________________, declare, under penalty of perjury, that all information stated on this form and on the documents I have submitted is true and correct. I further declare that I meet the minimum eligibility requirements of the utility tax rebate program.

This declaration was signed by me this ________ day of ____________________, 2017.

______________________________ ______________________________
Signature of Applicant Location (city, state) Signed

STOP

THE FOLLOWING IS FOR OFFICE USE ONLY:

DATE RECEIVED:

Proof of Income ☐

Original or Copies of Utility Bills ☐

TOTAL ANNUAL HOUSEHOLD INCOME: $ ______________

APPLICANT'S INCOME	
Source	**Amount**
Social Security:	$
Pension	$
Annuities	$
IRA Distribution	$
Wages, Tips	$
Interest	$
Other - ________	$
Other - ________	$
TOTAL	$

ADDITIONAL HOUSEHOLD INCOME:		
Source	**HH Member**	**Amount**
Social Security:		$
Pension		$
Annuities		$
IRA Distribution		$
Wages, Tips		$
Interest		$
Other - ________		$
Other - ________		$
	TOTAL	$

Gas/Electricity Taxes	$
Telephone Taxes	$
Cell Phone Taxes	$
Garbage Taxes	$
Cable TV Taxes	$
TOTAL TAXES PAID	$

Prepared By: ______________

Date: ______________

Rebate Amount: ______________

Purchasing Code: 103-0000-000-316-00-000

APPROVED: ☐ Yes ☐ NO If no, state why not:

____

______________________________ Approval

______________ Date