

CITY OF CHICO - FINANCE OFFICE

411 Main Street, Chico, CA 95928 (530) 879-7389

UTILITY USERS TAX REFUND APPLICATION AND CLAIM

MARK THIS BOX IF YOU WANT YOUR UTILITY BILLS RETURNED

EXEMPTION PROGRAM

(Pursuant to Section 3.56.190 and 3.56.200 of the Chico Municipal Code)

Directions: If applying for a Utility Users' Tax Refund, complete **Sections I, II, III and IV.**

If applying for an Exemption from Utility Users' Tax, complete **Sections I, II, and IV.**

SECTION I - APPLICANT INFORMATION

| | | |
|-------------------------|------------------|--|
| Name: | Phone No: | Age at last birthday: (Exemption ONLY) |
| Service Address: | | Number in Household: |
| Mailing Address: | | |

SECTION II - STATEMENT OF COMBINED ANNUAL TOTAL HOUSEHOLD INCOME - ALL SOURCES

| | |
|------------------------------------|----------------|
| Annual Household Income: \$ | Source: |
|------------------------------------|----------------|

-Includes but not limited to: Adjusted Gross Income, Alimony, Public Assistance & Relief, Pension Annuities, Social Security, Worker's Compensation, Unemployment Insurance, Tax Exempt Interest, Insurance Benefits, and Gifts

SECTION III - UTILITY USERS' TAX PAID

This application for refund must be supported with proof of household income along with copies of utility bills for the period of May 1 through April 30 and proof of payment by claimant or member of household. After this application has been audited by the Finance Office, a refund will be issued in accordance with refund provisions on the back of the application.

| Utility Users' Tax Paid | | | | |
|-------------------------|---------------|------------------------|-------------------|-----------|
| Month/Year | Water Service | Gas & Electric Service | Telephone Service | TOTAL |
| May 2015 | \$ | \$ | \$ | \$ |
| June 2015 | | | | |
| July 2015 | | | | |
| August 2015 | | | | |
| September 2015 | | | | |
| October 2015 | | | | |
| November 2015 | | | | |
| December 2015 | | | | |
| January 2016 | | | | |
| February 2016 | | | | |
| March 2016 | | | | |
| April 2016 | | | | |
| TOTAL | \$ | \$ | \$ | \$ |

SECTION IV - CERTIFICATION OF APPLICANT

- I certify that I have read this application and the General Information (on reverse side) thoroughly, that I understand its content, and that I have supplied true and correct information herein to the best of my knowledge and belief.
- I understand that any person required to sign and verify any report under the provisions of the City of Chico Municipal Code, who makes any false or fraudulent request with intent to defeat or evade the determination of any amount, is guilty of a misdemeanor.

Applicant Signature: _____

Date: _____



**CITY OF CHICO
UTILITY USERS' TAX REFUND & EXEMPTION PROGRAM
GENERAL INFORMATION**

A refund or an exemption from City Utility Users' Tax, for utility services provided may be approved when the following conditions are met:

- (1) City of Chico resident files an application with the City of Chico Finance Office for a refund or an exemption.
- (2) The application is approved by the Finance Office as being in conformance with Section 3.56.190 and/or 3.56.200 of the Chico Municipal Code. Only one member of each household may file an application and only one application may be filed for each household.
- (3) The **combined** annual income of the household in which the applicant lives for the 2015 Federal and State Personal Income Tax Year was less than the maximum annual income limits in the following schedule:

| <u>Household Size</u> | <u>Maximum Annual Income</u> | <u>Maximum Refund</u> |
|-----------------------|------------------------------|-----------------------|
| 1 | 33,000 | 106 |
| 2 | 37,700 | 121 |
| 3 | 42,400 | 136 |
| 4 | 47,100 | 151 |
| 5 | 50,900 | 163 |
| 6 | 54,650 | 175 |
| 7 | 58,450 | 187 |
| 8 | 62,200 | 199 |

- (4) The applicant shall be the person in whose name the bills for utility services were rendered.

Applications for Utility Users' Tax paid will be accepted from May 1, 2016 to June 30, 2016 for tax paid between May 1, 2015 and April 30, 2016.

The application must be accompanied by:

- Proof of household income (2015 Tax Return, Disability Statement, Social Security Letter, etc.)
- Copies of the utility bills including Water bills, Gas & Electric bills and Telephone bills paid by the applicant.

Refunds will be processed as follows:

- No refund shall be made on any application filed or postmarked later than June 30, 2016.
- All applications for refund will be paid with a check from the City of Chico.
- Utility bills will not be returned unless the box in Section III is marked.

Applicants for the Exemption Program shall have attained the age of 60 years prior to making the application for exemption. Eligibility for tax exemption for applicants 60 years or older shall be based on the maximum income for a two-person household as set forth above (\$37,700 for 2016). Applications for exemption are accepted any time during the year and must be accompanied by:

- Proof of household income (2015 Tax Return, Disability Statement, Social Security Letter, etc)
- Age of the applicant as documented by driver's license or birth certificate.