

January 17, 2020

Dear Federal Way Citizen,

We invite you to participate in the Federal Way 2019 Utility Tax Rebate program for low-income senior citizens. Our records show that you have either requested an application for the program or participated in prior years. This packet includes instructions, eligibility questions to complete, and an application for the program.

You may contact us at:

**Federal Way City Hall**

**Finance Department, Utility Tax Rebate Program**

**33325 8th Avenue South**

**Federal Way, Washington 98003-6325**

**Tax Rebate Line: 253-835-2506**

**Business hours: Monday – Friday 8:00 a.m. – 5:00 p.m.**

Thank you,

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Finance Director

**Who is eligible?**

You may be 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 2019…… YES  NO

You paid household utilities, which are in your name in 2019…………………… YES  NO

You were at least 65 years old in 2019………………………………………… YES  NO

(i.e. if you turned 65 in May, you may be eligible to receive a rebate for your May – December Utility taxes)

The annual gross income of your household in 2019 did not exceed the following: YES  NO

|  |  |  |
| --- | --- | --- |
| **People in Household** |  | **Maximum Annual Income** |
| 1 |  | $38,750 |
| 2 |  | $44.300 |
| 3 |  | $49,850 |
| 4 |  | $55,350 |
| 5 or more |  | Please call 253-835-2526 |

**What is Gross Household Income?**

This is the income received in the 2019 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? (PROVIDE COPIES ONLY)**

For all members of your household with an income:

* A U.S. Individual Tax Return Form 1040 for 2019 (if one was filed); **or**
* Bank statements for November and December 2019 (if no income tax return was filed); **and**
* Documentation for all sources of income not included in bank statements or on IRS Form 1040, including Social Security Income documentation.

**What other documentation must be provided?**

* Fully completed Low-Income Senior Citizen Utility Tax Rebate Program Application – enclosed.
* **Copies** of utility bills paid in 2019 for the following utilities only:
  + Gas and/or Electric, Telephone, Garbage, Cell Phone, Cable Television
  + Do NOT turn in Lakehaven Utility bills because Lakehaven Utility District **does not** remit utility tax to the city.
  + You must include **EVERY** page of each month’s bill so we may determine the amount of the rebate. 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 billed clipped together, all pages of February’s phone bill clipped together, etc). **FAILURE TO SUBMIT YOUR BILLS IN AN ORGANIZED MANNER COULD RESULT IN YOUR APPLICATION BEING DENIED AND RETURNED.**
  + **Copies** of bills need to include detailed taxes paid to be eligible for payment.
  + To prove payment of bills paid in December 2019 provide January and/or February 2020 bills shown as paid or a bank statement proving payment.
* **Please NOTE: Do NOT send original bills. All paperwork received will NOT be returned. Once your rebate is processed, all documents will be shredded. INCOMPLETE SUBMITTALS WILL BE RETURNED AND MUST BE RESUBMITTED BEFORE APRIL 30, 2020.**

**WHEN SHOULD i EXPECT TO RECEIVE MY TAX rebate CHECK?**

Rebate applications are processed in the order of which they are received. Processing time is expected to take 6 weeks from the time you submit your completed packet.

**WHEN ARE APPLICATIONS due?**

**Applications are due Thursday, April 30, 2020. 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:

**Federal Way City Hall**

**Finance Department**

**Attn: Utility Tax Rebate Program**

**33325 8th Ave S**

**Federal Way, WA 98003-6325**

**QUESTIONS OR COMMENTS?**

We are here to help you! Please contact the City of Federal Way Utility Tax Rebate Line at 253-835-2506. Monday – Friday 8:00 a.m. – 5:00 p.m.

Thank You!

2019 Low-Income Senior Citizen

**Utility Tax Rebate program 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 (COPIES ONLY)**  *(for all household members with an income)* |
| If you **did** file a 2019 tax return, provide:  ❑ Complete copy of 2019 tax return; **AND**  ❑ Documentation for all other income  **OR**  If you **did not** file a 2019 tax return:  ❑ **Copies** of bank statements from Nov & Dec 2019; **AND**  ❑ **Copies** of documentation for all other income not included in the bank statements, including Social Security Income documents  *Provide COPIES of all documents listed based on your tax filing status* |
|

**3. Please indicate how you would like to receive your check**:

❑ Please mail refund check to me.

❑ I will pick up refund check 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 , 2020.

Signature of Applicant Location (City, State) Signed