

2009 LOW-INCOME SENIOR CITIZEN UTILITY TAX REBATE PROGRAM

Beginning January 4, 2010 very low-income Federal Way senior citizens may qualify for a rebate of the Utility Taxes they incurred in **2009**.

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 2009..... YES NO

You paid household utilities, which are in your name in 2009..... YES NO

You were at least 65 years old in 2009..... YES NO

The annual gross income of your household in 2009 did not exceed the following: YES NO

People in Household	Maximum Annual Income
1	\$29,500
2	\$33,700
3	\$37,950
4	\$42,150
5 or more	Please call 253-835-2403

WHAT IS THE DEFINITION OF SENIOR CITIZEN FOR THIS PROGRAM?

Any person aged 65 and older. Citizens who turned 65 in 2009 will 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 INCOME OF HOUSEHOLD”?

This is the income received in the 2009 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 2009 (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 Disabled Citizen Utility Tax Rebate Application Form
- All **original** bills paid in 2009 (for the following utilities only):
 - Gas and/or Electric
 - Telephone
 - Garbage (Please Note: Lakehaven Utility District **does not** collect city tax)
 - Cell Phone
 - Cable Television

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

- Please staple or clip 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 may cause significant delays in processing your rebate.*

INCOMPLETE SUBMITTALS WILL BE RETURNED WITHOUT PROCESSING AND MUST BE RESUBMITTED TO OUR OFFICES BEFORE THE APRIL 30, 2010 DEADLINE.

WILL THE CITY RETURN MY INCOME DOCUMENTS AND UTILITY BILLS?

YES! Once your rebate is completely processed all of your original documents (except the application form) will be returned to you. We are happy to mail them to you or you may make arrangements to pick them up at City Hall – whichever you prefer. Please refer to #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 result in a much delayed refund. Due to staffing levels and normal processing time, we expect refunds to take approximately 8-10 weeks from the time you submit your completed packet.

WHEN ARE APPLICATIONS ACCEPTED?

Applications will be accepted Monday, January 4 through Friday, April 30, 2010. Applications received after this deadline will be returned.

QUESTIONS?

We're here to help you – and happy to do so! Please contact the City of Federal Way Utility Tax Rebate Line at 253-835-2403. 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 very promptly.

COMMENTS?

Please let us know how we can make this program easier to understand and how we might improve the application process. Please call 253-835-2403 with your comments and suggestions.

2009 LOW-INCOME SENIOR CITIZEN UTILITY TAX REBATE APPLICATION

1. Applicant Information:

Name: _____ Phone: _____

Address: _____ Zip Code: _____

SSN: _____ 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 2009 tax return, provide:

- Complete copy of 2009 tax return; **AND**
 Documentation for all other income

ORIf you **did not** file a 2009 tax return:

- Bank statements from Nov & Dec 2009; **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'd like your documents (and check for those who qualify) returned:**

Please mail

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 _____, 2010.

Signature of Applicant_____
Location (city, state) Signed



THE FOLLOWING IS FOR OFFICE USE ONLY:

DATE RECEIVED:

Proof of Income

Original Utility Bills

APPLICANT'S INCOME

ADDITIONAL HOUSEHOLD INCOME:

Source	Amount	Source	HH Member	Amount
Social Security:	_____	Social Security:	_____	_____
Pension	_____	Pension	_____	_____
Annuities	_____	Annuities	_____	_____
IRA Distribution	_____	IRA Distribution	_____	_____
Wages, Tips	_____	Wages, Tips	_____	_____
Interest	_____	Interest	_____	_____
Gifts	_____	Gifts	_____	_____
Other	_____	Other	_____	_____
TOTAL	_____		TOTAL	_____

TOTAL ANNUAL HOUSEHOLD INCOME: _____

Gas/Electricity Taxes _____

Prepared By: _____

Telephone Taxes _____

Date: _____

Cell Phone Taxes _____

Rebate Amount: _____

Garbage Taxes _____

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

Cable TV Taxes _____

APPROVED: Yes NO If no, state why not:

TOTAL TAXES PAID _____

Approval _____

Date _____