



City of Oakland

SPARE - Special Assessment Refunds and Exemptions
150 Frank H. Ogawa Plaza, Suite 5342
Oakland, CA 94612

Submit 2019 income

SPARE@OaklandCA.gov
(510) 238-2942
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SPECIAL ASSESSMENT REFUND APPLICATION FOR 2020-2021 PROPERTY TAX

To qualify for a full to partial refund, please complete the following (see reverse for directions):

1. Be the owner-occupant(s) of the property.

Last Name	First Name	Middle	Email Address
Parcel Number	Address		
	Oakland, CA 946 _____		

2. Under the column of Income Source below, include all sources of income received in **2019**, including salaries, wages, Social Disability, AFDC, business earnings, etc. Supporting documentation must be submitted.

Resident Name	Age	Relationship	2019 Income Amount	Income Source	Verification Document
		Head of Household			
Total Number of Residents =		Total Income: \$			

3. Have a combined family income from all sources (taxable and non-taxable income) in **2019** not exceeding the levels defined in the table below according to the U.S. Housing Urban Development and have the following Special Assessments on Property Tax Statement.

Number in Household	Very Low Income 50% 2019 Household Income	Very Low Income 60% 2019 Household Income	Low Income 80% 2019 Household Income
1	\$45,700	\$54,840	\$73,100
2	\$52,200	\$62,663	\$83,550
3	\$58,750	\$70,500	\$94,000
4	\$65,250	\$78,300	\$104,400
5	\$70,500	\$84,600	\$112,800
6	\$75,700	\$90,863	\$121,150
	LLAD (CITY LANDSCP/LIGHT) Measure Z (VIOLENCE PREV TAX) Measure O (CITY LIBRARY SERV) Measure D (CITY LIBRARY SRV-D)	Measure Q (parks and rec)	65 years of age and over, on or prior to July 1, 2020 Measure D (CITY LIBRARY SRV-D) Measure Q (parks and rec)

4. I declare under penalty of perjury that I own and live in the dwelling for which I am requesting a special assessment refund; that the income stated above is the total income for my household, and that all information provided herein is true to the best of my knowledge. I understand that if any of the above information is found to be untrue, I may forfeit my eligibility. I further understand that this form may be subject to an audit, verification check, and possible denial of the refund. I hereby authorize the City of Oakland to verify all the information herein provided.

Owner's Name	Owner's Signature	Date	Phone Number
Co-Owner's Name	Co-Owner's Signature	Date	Phone Number

Directions for filling out the special assessment refund application

2020-2021 property tax needs to be paid prior to submission of refund application. If refund application is approved, a refund check will be issued.

- To qualify for the refund, you must be the owner and occupant of the property. Please fill in your last, first and middle name, along with the parcel number and address. The potential amount of the refund will depend on the type of property shown in the table below. Refund applications must be received within one (1) year of the date of payment.

Use Code as defined by Alameda County	Potential Refund
Single Family Home	100%
Duplex	50%
Triplex	33%
Fourplex	25%
Five Units+	Not Eligible

- Examples of supporting documentation include income tax returns, payroll stubs, social security benefit letters, rent receipts and other award letters. All taxable and non-taxable income is included in the combined household income.

Property Tax Year	Income Required
2020-2021	2019 Income
1 st Installment Nov 1, 2020 (Due Dec 10, 2020)	
2 nd Installment Feb 1, 2021 (Due Apr 10, 2021)	

If submitting individual income tax return, attach a copy of pages 1 and 2.

If individual income tax return has a value on Line 7a, submit Schedule 1.

If Schedule 1 has a value on Line 3, attach a copy of Schedule C.

If Schedule 1 has a value on Line 5, attach a copy of Schedule E.

Information for No-Income Affidavit.

If a household member is age 18 and over and has no income, a No-Income Affidavit must be included.

If a household member is age 26 or younger and is listed as a dependent on the individual tax return, a No-Income Affidavit does not need to be included.

No-Income Affidavit can be downloaded at:

<https://www.oaklandca.gov/documents/special-assessment-no-income-affidavit>

- From item 2, total the number of residents and total the combined household income (taxable and non-taxable income) to check against the **Very Low Income** Combined 2019 Household Income table on application page.

* For individuals 65 years of age and over, on or prior to July 1, 2020 (**submit proof of age**), a refund for **Measure D and Q ONLY** may be possible, if total household income does not exceed the **Low Income** level per U.S. Housing and Urban Development, see table on application page.

The special assessments which may be eligible for an refund on Property Tax Statement:

LLAD (CITY LANDSCP/LIGHT) Measure Z (VIOLENCE PREV TAX) Measure O (CITY LIBRARY SERV)
 Measure D (CITY LIBRARY SRV-D)* Measure Q (parks and rec)*

- Be sure to print name, sign, provide contact information and date the application. If a co-owner is listed on the property, they must print their name, sign, provide contact information and date the application.

- Check application status online <https://www.oaklandca.gov/services/spare>

Submission of documents does not guarantee approval. Additional documentation may be requested.