

Safe, Clean Water and Natural Flood Protection

## Low-income senior property tax exemption



### Could you be exempt from paying the Safe, Clean Water property tax?

The Santa Clara Valley Water District offers an exemption from this tax if you are a qualifying low-income senior. If you qualify, apply between April 15 and June 30 and save up to \$60 on your property tax bill.

The Safe, Clean Water and Natural Flood Protection Program is a 15-year program approved by voters in November 2012 to provide a safe, reliable water supply, care for and restore wildlife habitat, creeks and open space, and to protect our water supply and local dams from earthquakes and other natural disasters.

Funding for the program comes from a parcel tax on Santa Clara County properties each year.

You could be exempt from the tax if you meet all of the following criteria:

- You were born before June 30, 1953.
- Your total household income for 2016 was below \$48,375. Total household income is the total gross income for every person over 18 years old who lives in the home. It excludes capital gains.
- You live in and own the home the tax is assessed on.

Please note that mobile homes in parks and homes that are in an irrevocable trust are not eligible.

If you meet these criteria, fill out the application and mail or bring it to the water district



administration building. **Be sure to include a COPY of your proof of age** (DO NOT send us the original!). This could be a copy of your driver's license, birth certificate, passport, or medical card that shows your birth date.

#### Mail or drop off:

Santa Clara Valley Water District  
Senior Exemption Program  
5750 Almaden Expressway  
San Jose, CA 95118

#### Hours:

Mon. to Fri., 8 a.m. to 5 p.m. (closed 12 to 1 p.m.)

For more information about the Safe, Clean Water low-income senior tax exemption, call our hotline at **(408) 630-2810**. For faster service, e-mail us at [seniorexemption@valleywater.org](mailto:seniorexemption@valleywater.org).

#### We speak your language

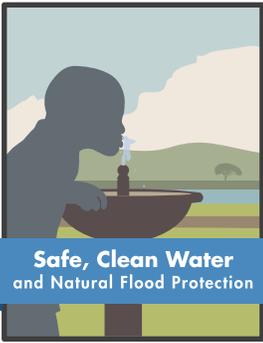
This form is available in Spanish, Chinese and Vietnamese.

*Este formulario está disponible en español.*

我們備有中文, 西班牙文和越南文表格。

Đơn này có mẫu tiếng Việt, Hoa, và Mỹ Tây Cơ.





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### Application form 2017/2018

Enrollment period April 15 – June 30, 2017

Property owner's name:

Birthdate:

Property street address:

City:  State:  ZIP:

Phone:    Email address:

Mailing address, if different than property address:

Address:

- Requirements:**
1. Born before June 30, 1953
  2. Own your home and live in it as your primary residence
  3. Total household income for 2016 was less than \$48,375

**Under penalty of perjury**, I declare that I meet the income and age criteria; I am authorized as an owner to make this claim, and that this claim, including accompanying documents was signed in Santa Clara County, and is to the best of my knowledge, true, correct and complete. The Santa Clara Valley Water District is hereby authorized to verify all information provided by the applicant.

Authorized Claimant Signature:  Date:

If name is different from property owner, please list relationship to applicant:

**Please sign the application and mail or bring it to the water district (see back for contact information) along with a COPY of your proof of age.** If you are signing on behalf of a senior, include a copy of your power of attorney, conservatorship or trustee documentation.

\* Indicates required information

[See back for address information »](#)

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## Application form 2017/2018

### Please check before mailing:

- Filled out all the required information.
- Signed and dated the form.
- Included a copy of proof of age.

### Mail or drop off form:

#### Address:

Santa Clara Valley Water District  
Attn: Senior Exemption Program  
5750 Almaden Expressway  
San Jose, CA 95118

#### Hours:

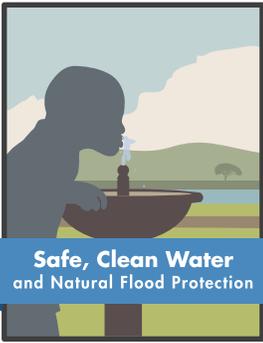
Mon to Fri, 8 a.m. to 5 p.m.  
Closed noon to 1 p.m.

#### Phone:

**(408) 630-2810**

#### E-mail:

***seniorexemption@valleywater.org***



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### Frequently Asked Questions:

#### What is acceptable documentation for proof of age?

Acceptable documents for proof of age are:

- Copy of your driver's license even if you have not renewed it
- Copy of your birth certificate even if you have a different last name now
- Copy of your passport
- Copy of a medical card that shows birth date

If you have none of these documents conveniently available to you, give us a call and we will make accommodations depending on your situation.

#### What does the water district consider to be total household income?

Total household income is the total of all income coming into the home for all persons over the age of 18 living in the home. It includes taxed and non-taxed income. The only exclusion from the total is one-time sale of property (capital gains).

Taxable income would include income from renting out a room. The yearly income of a person who rents from you is not considered part of your household income.

Example 1: Mr. and Mrs. B. both get social security and money from a mature life insurance annuity. The total household income includes both of their social security payments and the income from the annuity.

Example 2: Mrs. A rents out a room in her house for income in addition to her social security. Her total household income is the rent minus expenses associated with the rental, plus her social security.

#### It doesn't say anything about sending in proof of income. Do I have to send anything in to verify I meet the income requirement?

No, we do not require any proof of income. Your signature on the form is enough legal proof for us. By signing the form, under penalty of perjury, you are legally declaring that you meet the income requirement.

#### Do I have to re-apply every year?

You do not have to fill out an application every year. Once you have sent in your application and have been accepted into the exemption program, we will keep your information on our exemption list. Every April, we will send you a verification letter and form. The letter will ask you to fill out a simple form. Then it asks you to check 3 boxes, yes or no, to determine if you still qualify. You will check the appropriate boxes, sign the form, and send it back in the envelope provided. You do not have to include any proof of income or age.

[Continued on the back »](#)

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## Low-Income Senior Exemption for Safe, Clean Water Special Tax

### Frequently Asked Questions:

#### Will I get a refund check every year?

No. This program is meant to be an exemption, not a rebate. This means that once you have applied and been accepted into the program, you will not be billed for the **SCVWD – Safe Clean Water** special tax on your next property tax bill.

#### I thought I applied for an exemption. Why am I still paying a special assessment on my property tax for SCVWD flood control?

The assessment on your property tax bill for **SCVWD – Flood** is not included in our exemption program. When the Benefit Assessment Act creating the flood control special assessment was passed by the voters, it did not have a provision that allowed for a low-income senior exemption. When Measure B (Safe, Clean Water) was written, the water district included an exemption for low-income seniors. The measure was approved by two-thirds of the voters in the county. That is why the exemption is available only for the Safe, Clean

Water special tax and not for the special assessment shown as “SCVWD – Flood” on your property tax bill.

#### How can I tell if I am getting my exemption?

You are receiving your exemption if you **do not see** a charge on your property tax for the following special assessment tax: (Look in the area where they have the charge for the Library)

**728 SCVWD Safe, Clean Water \$\$\$\$\$**

You will see the charge for 88\_\_ SCVWD Flood, which is the charge we cannot give an exemption for.

Below is an example of the Special Assessment Taxes on your property tax bill. This example shows the charge for 728 SCVWD Safe, Clean Water. This charge will not be on your bill if you are getting your exemption.

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### Example of tax bill showing Special Assessment Taxes:

Special Assessment Taxes	
728 SCVWD Safe, Clean Water	55.84
800 SJ SEWER SANI/STORM	500.40
802 S.J. LIBRARY ASSMT.	29.84
847 SCCO VECTOR CONTRO	5.08
848 MOSQUITO ASMT #2	8.36
882 SCVWD FLOOD CONTR	24.50
990 SCCOSA ASMT DIST 1	12.00
Special Assessments	\$636.02

← 728 SCVWD Safe, Clean Water charge will be removed. (Dollar amounts will be different each year.)