

CITY OF OAKLAND



150 FRANK H. OGAWA PLAZA, SUITE 5342 • OAKLAND, CALIFORNIA 94612

Finance Department
Revenue Management Bureau

(510) 238-2942
TDD (510) 238-3254

October 2016

**RE: Refund Application for Qualified Taxpayers for City of Oakland Special Assessments
(Maintenance Districts Only)**

Dear Oakland Taxpayer,

This letter is a reminder that the City of Oakland offers a “very low income” refund program for property owners who qualify for three (3) special assessment districts – Landscape Lighting Assessment District (LLAD), Measure O (Library), and Measure Z (Violence Prevention).

Landscape Lighting Assessment District (LLAD) allocates the costs of maintaining and servicing landscaped areas, recreation facilities and street lighting within the City of Oakland among residential and non-residential property owners.

Library Services Retention Assessment seeks to provide funds necessary to maintain and enhance library services in the City of Oakland.

Measure Z, also known as Public Safety and Violence Prevention Act of 2014 provides funding for Violence, Crime and Fire Prevention Program in the City of Oakland.

The billing and collection of the special assessments are handled by the County of Alameda. The assessment is listed as a separate item on your **2016/2017** property tax statement and **must be paid together with your property taxes.**

To qualify for a “very low income” refund, you must be: (1) the owner-occupant(s) of the property and (2) your combined family household income for the previous year 2015 must meet the following eligibility criteria:

Number in Household	Combined 2015 Household Income	Number in Household	Combined 2015 Household Income
1	32,550	5	50,200
2	37,200	6	53,900
3	41,850	7	57,600
4	46,450	8	61,350

To apply for a refund, please follow the guidelines listed below:

1. Complete a **2016/2017** Special Assessment refund application.
2. Submit any of the following documentation for each household member who received income in 2015.

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Proof of income can be any of the following:

- a. Completed and signed copy of **2015** Federal Tax Return (1040) with attached schedules.
- b. **2015** Social Security and SSI Benefit Statements. Please obtain a copy from the nearest Social Security Office or call **1-800-772-1213**. You must submit copies of SSA and SSI Benefits if you receive both.
- c. **2015** Retirement Benefit/Pension Statement.

Other supporting documentation includes W-2 forms, banks interest statements, rent receipts, AFDC verification, other award letters.

For each household member who had no income in 2015 and who is 18 years or older, you must submit a No Income Affidavit. Please contact the Revenue Audit Section for the form.

1. Submit proof of payment of the assessment with the refund application.

Proof of payment can be any of the following:

- a. A copy of your **cancelled check** (front and back) paid to the Alameda County Tax Collector's Office.
- b. A **paid receipt** issued by the Alameda County Tax Collector's Office.
- c. A copy of your 2016/2017 property tax statement stamped "**paid**" by the Alameda County Tax Collector's Office.

This procedure must be followed each year. Staff will continue to make every effort to handle each refund as expeditiously as possible. The refund check will be mailed to you within 90 days after your application is approved.

If you require additional information, please contact the Revenue Audit Section at (510) 238-2942; or please visit our office between the hours of 8:00 A.M. and 4:00P.M., Monday through Friday.

You can also visit our website at:

www.oaklandnet.com/government/fwawebsite/revenue/revenue_home.

OFFICE / MAILING ADDRESS

City of Oakland, Revenue Audit Section
150 Frank Ogawa Plaza, Suite 5342
Oakland, CA 94612

Information for Multi-Family units:

1. Owners of multi-family units must submit copy of 2015 Federal Tax Return (Form 1040). If exempt or did not file a return, proof should be provided.
2. Proof that both installment payments for the property tax were made should be submitted to our office on or before June 30, 2017.

**** Applications submitted or received after June 30, 2017 will be rejected and denied.**