

RESIDENTIAL RENTAL TAX EXEMPTION FORM

Acceptable documentation must accompany Exemption Form. Exemption will be DENIED if requested documentation and signature are not provided. Please indicate the number of units you are applying for under the "Number of Units" box. **Proof of exemption eligibility is required for certain exemptions** and may be different for each exemption claimed. Exemption eligibility is only good for one year and must be renewed each taxable year by the tax due date or be subject to an administrative fee.

See backside of form for explanation of exemptions.

Property Owner: _____

Account #: _____

Parcel #: _____

Property Location: _____

Number of Units: _____

	Number of Units	Exemption Category
1.		OWNER OCCUPIED- Unit is primary residence of the property owner and no portion of the residence is rented, leased or sublet for any portion of the year. (Attach a copy of a utility bill from the previous tax year (2020). Bill should be in property owner's name).
2.		UNIT IS RENTED BY IMMEDIATE FAMILY MEMBER- Proof Required (see reverse) A. Provide Name of immediate family member: _____ Relationship _____ B. Provide the address of the immediate family member named on Line A: _____ C. What is the monthly rent charged to the immediate family member? If zero, write "0" _____ D. Itemize owners monthly expenses: Mortgage: _____ Taxes: _____ Insurance: _____ Homeowners Association Dues: _____ Total Expenses _____ E. To be completed by Family Member named on Line A: I declare that I have lived in the property on Line B since _____ and that the property owner is my _____ (relationship) and that the monthly rent paid is \$ _____ Signature of Family Member named on Line A: _____
3.		Family Trust – Must be occupied by Trustee/Beneficiary, not rented. Enclose copy of the Trust (page listing names of beneficiaries/trustees) and proof of residence (See reverse side). Name of Occupant: _____ Lived in property since: _____
4.		Unit was not available for rent for any period of time in 2020 (please explain on back of form)
5.		The unit is directly owned by a federal, state, county local or special district governmental agency.
6.		The unit is unoccupied and is under construction and was not occupied for any portion of the tax year (please submit Building permit # on back of form).
7.		The unit is sold and escrow closed during the first 2 months of 2020

I certify under penalty of perjury that all statements made on this form are true and complete to the best of my knowledge.

Signature: _____ Date: _____

Daytime Telephone: _____

EXEMPTIONS

- Exemption #1** If there is only 1 unit on the property and you, as the owner of this property, lived in this unit for at least 6 months in 2019, the unit is exempt. If there is more than 1 unit and you live in more than 1 unit, then all the units you, as the property owner live in are exempt under this category. **Please provide copy of utility bill from 2020. Utility bill must be in Property Owners name.**
- Exemption #2** A “family member” is defined as either of the following: spouse, parent, child, brother, sister, stepchild, adopted child, grandchild or grandparent. **Proof of residence is required***. Room Mates or rooms rented out to non-family members remove the exemption eligibility of the unit.
- Exemption #3** **Proof of residence*** may be any of the following, provided that it show the owner/family member name and site address as the owner/family member mailing address: **copy of current utility bill*** or **DMV registration.**
- Exemption #4** Unit was not available for rent for any period of time in 2020, **please indicate below how the property was used in 2020.**
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- Exemption #5** If the property owner’s name is not clearly the name of a governmental agency, please indicate below the full name of the governmental agency.
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- Exemption #6** If the unit was unoccupied and under construction in 2020, **please indicate below the Building Inspection Permit Number issued by the City of National City.**
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- Exemption #7** If the unit was sold and escrow closed during *the first 2 months of 2020*, please indicate below the date escrow closed.
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If you have any questions or comments about this form, please call us at (619)382-2596