



ELK GROVE UNIFIED SCHOOL DISTRICT - MELLO-ROOS TAX REDUCTION (*DIRECT LEVY #0155*)

PLEASE REVIEW THE INSTRUCTIONS PAGE BEFORE SUBMITTING THIS APPLICATION

THIS REDUCTION ONLY APPLIES TO DIRECT LEVY #0155 OF YOUR PROPERTY TAX BILL

LAST NAME: _____ FIRST NAME: _____ M.I. _____

RESIDENCE ADDRESS: _____ APT/UNIT # _____

CITY: _____ CA ZIP CODE: _____

E-MAIL: _____ PHONE: _____

ASSESSOR'S PARCEL NUMBER (APN): _____

CHECK ONE OF THE FOLLOWING TO INDICATE YOUR QUALIFICATION STATUS

☐ 65 YEARS OF AGE OR OLDER (*as of June 30*) ☐ PERMANENTLY DISABLED

DO SCHOOL-AGE CHILDREN (GRADES TK-12) LIVE IN YOUR HOME? ☐ YES ☐ NO

DO YOU CURRENTLY LIVE AT THE ADDRESS ABOVE? ☐ YES ☐ NO

ARE YOU THE HOMEOWNER OF THE PROPERTY LISTED ON THIS APPLICATION? ☐ YES ☐ NO*

**If you do not own the property on which you reside (for example, you live in an apartment complex, a mobile home park, or rent your home), the owner/property manager must complete the bottom section of this application in order for you to be eligible to receive the reduction.*

PLEASE SIGN YOUR APPLICATION BELOW CERTIFYING THE FOLLOWING

By signing below, you confirm the following:

- I have read the instructions page on this application (page 2)
- I meet the qualifications to receive the 70% tax reduction for direct levy #0155 (EGUSD Mello-Roos Tax)
- I have attached copies of my qualifying documentation
- No school-age children (grades TK-12) live in the home or registered/enrolled into an EGUSD school
- I currently live at the property as this is my primary residence

Under penalty of perjury, I declare that the information provided in this application and the attached documentation are true, correct, and complete to the best of my knowledge.

SIGNATURE

DATE

*APPLICANTS WHO RENT OR LEASE, MUST HAVE THIS SECTION COMPLETED BY THE PROPERTY OWNER/PROPERTY MANAGER

COMPANY NAME/OWNER: _____ PHONE: _____

MAILING ADDRESS: _____ CITY: _____ ZIP: _____

Under penalty of perjury, I hereby declare that I am the owner or property manager of record for the property which the reduction is claimed and hereby certify that the entire reduced tax amount will be reflected in the rent for the exempted unit(s) only.

SIGNATURE: _____ DATE: _____

INSTRUCTIONS FOR EGUSD MELLO-ROOS TAX REDUCTION APPLICATION

APPLICATION PROCESS

1. **COMPLETE THE APPLICATION** (*only one applicant per household may apply*)
2. **INCLUDE A COPY OF YOUR QUALIFYING DOCUMENTATION**

You must provide a qualifying documentation that the applicant is 65+ years old OR permanently disabled. Only **ONE** (1) of the following is required.

65 years of age or older:

- Driver's License / Identification Card
- Birth Certificate
- Medicare Card

Permanently Disabled:

- Social Security Disability Award Letter
- Supplemental Security Income Letter

A COPY OF THE QUALIFYING DOCUMENTATION MUST BE ATTACHED TO THE COMPLETED APPLICATION

3. **SUBMIT YOUR COMPLETED APPLICATION ALONG WITH THE QUALIFYING DOCUMENTATION** via e-mail to: schooltax@egusd.net or mail to:

Elk Grove Unified School District
9510 Elk Grove-Florin Rd
Elk Grove, CA 95624
Attn: Facilities & Planning, Room 206

FILING PERIOD: The filing period each year is **APRIL 15** through **JUNE 30**

You must have a completed application filed by **June 30th** to initiate the first year's reduction.

RETROACTIVE REDUCTIONS DO NOT APPLY. This reduction will be *effective July 1st* through **June 30th** (for the upcoming tax year). In order to continue to receive the 70% EGUSD Mello-Roos Tax Reduction for **direct levy #0155**

YOU MUST RENEW YOUR STATUS EACH YEAR DURING THE FILING PERIOD

70% REDUCTION ONLY APPLIES TO DIRECT LEVY #0155 OF YOUR PROPERTY TAX BILL
(ELK GROVE UNIFIED SCHOOL DISTRICT CFD NO. 1 MELLO-ROOS TAX)

THE REDUCTION CAN ONLY BE APPLIED TO THE APPLICANT'S PRIMARY RESIDENCE
ALL OTHER PROPERTIES ARE SUBJECT TO THE FULL TAX

ONLY ONE APPLICANT PER HOUSEHOLD CAN APPLY FOR THE EGUSD MELLO-ROOS TAX REDUCTION

The tax reduction pertains to the property tax that is levied on the LAND. Ownership would indicate that the land is owned; ownership of only a mobile home does not constitute land ownership. If the land on which the applicant lives is rented/leased, then the owner of the land must fill out the bottom portion of the application. Applicants must be listed on the rental agreement.

SCHOOL AGE CHILDREN - There must not have been any school-age children (grades TK-12) living in the residence or enrolled to an EGUSD school for the 24 months prior to the June 30th deadline. If school-age children are registered and enrolled to an EGUSD school in the residence within those 24 months, the applicant does not qualify for the reduction.

AGE 65 OR OLDER - Applicants must be 65 years old by June 30th of the current year to be eligible for the reduction.

PERMANENTLY DISABLED – Per Social Security Administration and California State Controller's Office (SCO): A disabled person is defined as "an individual who is unable to engage in any substantial, gainful activity by reason of any medically determinable physical or mental impairment that can be expected to last for a continuous period of not less than twelve months." Further, you shall be determined to be "disabled" only if the physical or mental impairments are of such severity that you are not only unable to do your previous type of work, but cannot (considering age, education, and work experience) engage in any kind of substantial gainful work.

The application along with the qualifying documentation shall be submitted to the Elk Grove Unified School District, Facilities and Planning office by **June 30th**. For additional information, please review the FAQs on our website or contact the Elk Grove Unified School District Mello-Roos Tax Line at **(916) 686-7562** or e-mail: schooltax@egusd.net.