



Finance Department  
Revenue Collection Division

Form: FINRC-VLI-APP  
Revised: June 2018

## Very Low Income Refund Program

The City of Berkeley and the Berkeley Unified School District offer a tax relief refund program for households with an annual income of \$46,500 or less effective July 1, 2018, (the previous limit was \$37,400).

These programs provide a refund of the following items:

Property Tax Bill		Other
City of Berkeley	Berkeley Unified School District	
Library Tax	Berkeley School Tax*	Sanitary Sewer fees included on the EBMUD water bill
Landscape/Parks Tax	Berkeley School Maintenance Tax*	Utility Users Tax included on the local cable bill
Community Facility District 1 (CFD1) - Fire Tax		
Clean Storm Water fee		
Fire Protection Emergency Response & Preparedness Tax		

\*Note: Refund is available only to very-low income seniors (65 and older).

For more information, please visit the following websites:

[Property Tax Bill: City of Berkeley & Berkeley Unified School District](#)  
[Sanitary Sewer Fees](#)  
[Utility User's Tax](#)

### Who is Eligible?

Effective July 1, 2018: Households with a total annual household income of \$46,500 or less are eligible to participate in the program. The annual very low income household threshold is dependent on the Housing and Urban Development (HUD) Very Low Income (VLI) limit. For more information or to verify the HUD amount, please visit the following link: <https://www.huduser.gov/portal/datasets/il/il2018/2018summary.odn>

## How do I File a Claim?

To apply for a Very Low Income Refund, applicants must complete a [Claim for Very Low Income Refund](#) form and submit the form and all supporting documentation to:

City of Berkeley  
Attn: Very Low Income Refund Program  
Finance Department - Revenue Collection  
1947 Center Street, 1<sup>st</sup> Floor  
Berkeley, California 94704

Claims must be filed within one (1) year of payment of taxes and/or fees.

Please allow 2-3 weeks for processing once all the necessary documents are received.

### Supporting Documentation:

1. Proof of Payment (required):

A copy of the taxpayer's property tax bill, along with evidence of payment of both tax installments and payment of utility (cable and sewer) bills. Accepted evidence includes copies of canceled checks (front and back), cash receipts, and check images from a financial institution, and/or credit card or bank statements with specific payment amounts indicated.

2. Proof of Income (required):

- a. Attach a complete income tax return or a copy of the statement with the amount earned for the year; OR,
- b. If the taxpayer did not file an income tax return, attach a Letter 4506-T from the [Internal Revenue Service](#) (IRS) stating taxes were not filed for the year.

Note: The current version of this form is not available until after April 15 of each year. To obtain this letter from the IRS, please call (800) 829-1040.

3. Senior Exemption for BUSD refunds:

If you are 65 years old or older, please provide a photo copy of ID to receive refunds for Berkeley Unified School District special taxes.

4. Household Documentation:

If persons other than the claimant are listed on the property title, the [Very Low Income Supplemental Information](#) form must be completed and submitted with the claim.

This material is available in alternative formats upon request. Alternative formats include audio-format, braille, large print, electronic text, etc. Please contact us via email or phone number below to make your request and allow 7-10 days for production of the material in an alternative format.

[Home](#) | [Web Policy](#) | [Text-Only Site Map](#) | [Contact Us](#)

[Finance Department](#), 1947 Center Street, 1<sup>st</sup> floor, Berkeley, CA 94704

Questions or comments? Email: [VLrefund@cityofberkeley.info](mailto:VLrefund@cityofberkeley.info) Phone: (510) 981-7365

(510) 981-CITY/2489 or 311 from any landline in Berkeley; TTD: (510) 981-6903