



Utility Users Tax Senior Exemption Application Residential Customers Only

Mailing Address:
City of Santa Cruz Finance
809 Center Street, Room 101
Santa Cruz, CA 95060

Questions:
(831) 420-5070
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ELIGIBILITY REQUIREMENTS:

To be exempt from the City of Santa Cruz utility users tax of 8.5% on the first \$100 in combined monthly charges for PG&E electricity and gas services you must meet both of the following requirements:

- 1a. You are 65 years of age or older (*proof of age required*); **or**
- 1b. You share your residence with a spouse or registered domestic partner, and at least one of you is 65 years of age or older (proof of age required, and proof of registered domestic partnership if applicable); **AND**
2. The location receiving the utility services is your primary residence (*proof of residence required*) and you are liable for paying the electricity/gas bills (utility account must be in the name of the senior, their spouse or their registered domestic partner). Exemption does not apply to nonresidential locations.

If you are already receiving the senior exemption, you do not need to file an application again at this time.

APPLICANT INFORMATION (please print clearly):

Senior's Name (*proof of age must be attached, see below*):

Telephone (include area code):

Applicant's Name (if other than the senior listed above):

Relationship of applicant to senior:

Spouse Domestic Partner

Other (list): _____

Full Home Address of Senior (location of PG&E services):

PG&E ACCOUNT INFORMATION (please print clearly):

Please provide the PG&E account information requested below exactly as it appears on the PG&E bill. Any erroneous or incomplete information may delay the exemption. If possible, please attach a copy of the stub from the bill that shows the account holder name and account number.

Name on Account:

If name on account is not the senior, please check below the relationship to senior:

Spouse Domestic Partner

Other (list): _____

Full Mailing Address (if different than home address above):

PG&E Account Number (not service ID):

DECLARATION (please read and sign):

I have attached or provided proof of age and residence address, such as a copy of a current California Driver's License or California Identification Card, as well as any other required documentation. I agree to provide any additional information that may be requested.

I state, under penalty of perjury, that the information I have provided in this application is true and correct. I agree to inform the City of Santa Cruz if I no longer qualify to receive the exemption. I understand that if I receive the exemption without qualifying for it, I may be required to pay back any discounts that I received.

Signature:

Date:

FOR CITY USE ONLY:

Age verified Address verified Verified by _____ Date _____

Application reviewed by _____ Date _____

PG&E exception due to _____ Re-submit date _____

City of Santa Cruz Utility Users Tax Exemptions Information Sheet

The City of Santa Cruz currently has a program that provides for utility users tax (UUT) exemptions on gas and electricity services for low-income residents and senior citizens. These exemptions apply to residential customers only. Eligible residents that qualify for either the low-income or senior exemption will not have to pay the UUT on the first \$100 in combined monthly charges for gas and electricity services.

Low-Income Exemption

To receive the low-income exemption, the resident must be qualified for and enrolled in Pacific Gas & Electric (PG&E) Company's California Alternate Rates for Energy (CARE) program. The CARE program provides a monthly discount on energy bills for income-qualified households. Previously, the CARE program exempted the first \$34 of monthly energy bills for combined gas and electricity services; however, approved Santa Cruz city residents will receive exemptions on the first \$100 instead. Qualifications for this program are based on the number of persons living in the home and the total annual household income. Residents can apply online for the CARE program at PG&E's website www.pge.com. Residents can also have an application mailed to them by calling 1-866-PGE-CARE or e-mailing to CAREandFERA@pge.com.

Senior Exemption

To qualify for the senior exemption, the individual must either: (a) be 65 years of age or older; or (b) share his/her residence with a spouse or registered domestic partner that is 65 years of age or older. The qualifying individual must reside primarily at the location receiving the utility services and the account must be in the name of the senior or their spouse or registered domestic partner. To request an exemption, the individual needs to file an exemption application (form on reverse) with the City of Santa Cruz Finance Department at the address shown on the application. The City will make a determination within 60 days whether the exemption is granted, and if so, the City will notify the service provider. For customers receiving the gas and electricity services from their landlord or other non-PG&E service provider, please include the name and address of your landlord or service provider on the application so that they can be notified of your exemption if approved.

If you are already receiving the senior exemption, you do not need to file an application again at this time. On your PG&E bill the exemption will show as a credit under both the gas and electric sections.

If you have any questions, please contact the City Customer Service staff at (831) 420-5070.