



# HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE



This form is for applications submitted from 1/07/2018 - 30/06/2019

**NOTE:**

- **EACH APPLICANT SHOULD READ THIS INFORMATION BEFORE COMPLETING AND SUBMITTING THE APPLICATION FORM.**
- Please read the Terms Used on Page 7 for explanations of terms used in completing the Application.
- Please retain this Guide for your reference.

**YOUR OBLIGATIONS**

As an Applicant for the Harrisdale Green Housing Affordability Fund Rebate you must ensure that the information contained in your application for the rebate is complete and correct.

Each application will be reviewed by the Authorised Assessor who is independent from the Housing Authority and Cedar Woods Properties Harrisdale Pty Ltd.

The provision of false or misleading information is an offence. Therefore if you are unsure about any of your obligations or the information that is required in the application, it is important that you contact the Authorised Assessor for clarification. Please refer to Page 6 for contact details for the Authorised Assessor.

If your application is approved and the rebate is paid, you will be notified in writing of the conditions, if any, you are required to satisfy.

If you are unable to satisfy any of these conditions, you must notify the Authorised Assessor within 30 days of you becoming aware that a condition has not been met and repay the rebate. If you do not meet these obligations you may be subject to prosecution.

**NOTE: You must complete your application in full and supply all required supporting documents when you lodge your application. If you do not supply all required supporting documents your application cannot be processed and may be rejected.**

**TO APPLY**

Applicants must:

- Complete the application form in full and lodge it with all required supporting documentation.
- Never have been paid a Housing Affordability Fund Rebate in any State or Territory of Australia or had to repay a Housing Affordability Fund rebate.
- Be a natural person (ie. not a company or trust), at least 18 years of age at the Lodgement Date.
- Ensure at least one Applicant is an Australian Citizen or a Permanent Australian Resident at the Lodgement Date.
- Ensure that the Combined Taxable Income of all Applicants and their Spouse/De facto Partner for the year ending 30 June 2018 is less than \$130,000.
- Ensure that the Combined Taxable Income of all Applicants and their Spouse/De facto Partner in the 3 consecutive months preceding the Lodgement Date is less than \$130,000 on an annualised basis.
- Be the First Purchaser(s) of a Newly Created Lot at Harrisdale Green and must not have sold the Lot or entered into a contract or otherwise agreed to sell the Lot prior to the Lodgement Date or the Settlement Date.
- Ensure all Applicants will reside at the address which is the subject of this application as their Principal Place of Residence for a continuous period of at least 6 months commencing within 12 months of the completion of construction of a Home on the Lot.
- Ensure each person holding a Relevant Interest in the Lot is an Applicant.

**NOTE: Your application will take a minimum of 28 days to be processed by the Authorised**



## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

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### SUPPORTING EVIDENCE

#### **1. Proof of Identity** **Refer to Application Form:** **SECTION 2 and SECTION 3**

Assessor, calculated from the date the Authorised Assessor receives your fully completed application form and all required supporting documents.

NOTE:

- Each Applicant and their Spouse/De facto Partner must provide a Certified Copy of ALL documents. Please read the Terms Used on Page 7 for the definition of a Certified Copy.
- The Authorised Assessor cannot certify documents for you.
- A single document cannot be used for more than one category.
- Preferred documents are shown below. If you are unable to provide the preferred documents, please contact the Authorised Assessor to discuss your circumstances. Refer to Page 6 for contact details.
- Do not mail original documents.

**Category 1** – Primary identity document and evidence of citizenship or permanent residency (Provide one of the following documents.)

If an Australian Citizen:

- Australian birth certificate issued by Registry of Births, Deaths and Marriages, or
- Australian Passport, or
- Australian Citizenship Certificate, or
- Australian Birth Extract

If a Citizen of another country:

- Current passport, or
- Australian Citizenship Certificate, or
- Permanent Residency Certificate (Form 283), or
- Permanent Residency Visa

NOTE: At least one Applicant must have a Permanent Residency Visa or Australian Citizenship Certificate. Permanent Residency Visa must have been issued on or before the Lodgement Date.

**Category 2** – Evidence of linkage between identity and Person (photo and signature). (Provide one of the following documents):

- Australian Drivers Licence (current), or
- Passport (current), or
- Firearms Licence (current), or
- Proof of Age issued by Consumer Affairs (photo ID card).

NOTE: Every Applicant must have 1 photo identity within this category. If the Applicant is unable to provide this photo identity, they must provide a certified photocopy of a photo of the Applicant with a Statutory Declaration explaining why they do not have a photo identity.

**Category 3** – Evidence that the Applicant resides in Australia (Provide one of the following documents):

- Medicare Card, or
- Motor Vehicle Registration, or
- Centrelink or Department of Veterans Affairs Card, or
- Debit/Credit Card of a financial institution

**Category 4** – Evidence of Applicant's residential address (Provide one of the following documents):

- Utility documents of residential address (eg bills for electricity, gas, water, etc), or
- Insurance Policy with current residential address, or
- Statement of account of a financial institution

Additional supporting evidence is required if any of the following applies to you.

## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

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If you are:

- Married – a copy of your marriage certificate
- Divorced – a copy of your divorce certificate
- Widowed – a copy of the death certificate of your Spouse/De facto Partner
- Name change – a copy of the change of name certificate
- Separated – a statutory declaration with the following information:
  - o The name of your former Spouse/De facto Partner
  - o Spouse/De facto Partner's date of birth
  - o The date you were married or commenced your domestic relationship
  - o The date you separated
  - o Your former Spouse/De facto Partner's current address (if known) and
  - o A statement to the effect that you do not live together and have no intention of resuming cohabitation.

**NOTE:** Evidence of a Change of Name is required if the name on any of the documents presented is different to the name of the Applicant (eg change of name certificate, statutory declaration).

### **2. Income Details** **Refer to Application Form:** **SECTION 4**

Each Applicant and their Spouse/De facto Partner must provide a Certified Copy of the following documents:

- Australian Tax Office (ATO) Notice of Assessment for the year ending 30 June 2018;
- If you or your spouse/de facto partner are self employed, a Profit & Loss statement for the business prepared and verified in writing by an accountant for the preceding financial quarter;
- If you, or your spouse/de facto partner, are not self employed, pay slips for the 3 consecutive months preceding the Lodgement Date.

**NOTE:** If you are unable to provide any or all of the above documents, you must provide a statutory declaration detailing the reasons why this is not possible. You may also be required to provide additional documentary evidence acceptable to the Authorised Assessor to support this claim. The Authorised Assessor has absolute discretion in determining whether the above documents will be acceptable in demonstrating that the Combined Taxable Income of all Applicants and their Spouse/De facto Partners for the year ending 30 June 2018 is less than \$130,000. Please contact the Authorised Assessor to discuss your circumstances. Refer to Page 6 for contact details.

### **3. Property Details** **Refer to Application Form:** **SECTION 5**

You must complete the details on the application form and provide a Certified Copy of the Contract for Sale and Purchase of the Lot or, if you own the Lot, a Title Search of the Lot at Harrisdale Green to which this application relates as evidence that each Applicant is or will be the registered Owner of that Lot. Please refer to the "Terms Used" on page 7 for an explanation of what a Title Search is.

## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

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**COMPLETING THE APPLICATION FORM** The Harrisdale Green Housing Affordability Fund Rebate application form has 10 Sections. These sections must be completed as follows:

### **Section 1 – Eligibility Criteria**

Answer Questions 1 to 9 of the Eligibility Checklist by ticking the relevant Yes or No box. The answers are designed to establish that the Applicant(s) for the rebate meet the eligibility criteria.

All persons with a Relevant Interest in the Lot (refer to 'Terms used' on page 7) and any Spouse/De facto Partner of these persons must be considered when answering these questions.

All applications are assessed and determined for eligibility by the Authorised Assessor. The Assessor's determination is final. In exceptional circumstances the Authorised Assessor may recommend determination to the Harrisdale Green Project Board who may use discretion relating to the eligibility criteria. Please contact the Authorised Assessor for further information.

If your application is rejected, you may resubmit your application to the Authorised Assessor for review if you have new or revised information that demonstrates your eligibility for the rebate.

### **Section 2 – Applicant Details**

Detail the number of persons with a Relevant Interest. All persons who have, or who will have, a Relevant Interest in the Lot must record their details in this section.

If there are more than two Applicants, an additional application will need to be completed and attached to the application form.

If an Applicant has a Spouse/De facto Partner, there are two options. If your Spouse/De facto Partner is an Applicant they must be recorded within this section. If your Spouse/De facto Partner is NOT an Applicant, you are required to complete the details in Section 3 of the application form and they must sign the Declaration in Section 9.

Please nominate a postal address for correspondence to be sent on behalf of all Applicants.

### **Section 3 – Spouse / De facto Partner Details**

This section must be completed by the Applicant in relation to the Spouse/De facto Partner of the Applicant who has NOT been specified as an Applicant (and therefore will have no Relevant Interest in the Lot). If this section is required to be completed the Spouse/De facto Partner must complete the Declaration in Section 9.

### **Section 4 – Income Details**

This section must be completed by each Applicant and their Spouse/De facto Partner. Provide your tax file number, taxable income for the year ending 30th June 2013 and taxable income for the 3 consecutive months preceding the Lodgement Date of your application. You can obtain this information from your ATO Notice of Assessment for FY2013 and your most recent payslips or, if self employed, a profit & loss statement for the business prepared and verified in writing by an accountant for the preceding financial quarter.

### **Section 5 – Property Details**

Provide a Certified Copy of the Contract for Sale and Purchase of the Lot or, if you own the Lot, the current title (Volume and Folio numbers) details of the Lot. The title number can be obtained from the Contract for Sale and Purchase, the Transfer of Land document or a Title Search.

### **Section 6 – Principal Place of Residence**

Provide the expected date of occupancy as Owner of your Home on the Lot. Estimate this date if you are unsure.

To be eligible for the rebate, an Applicant must move into their Home on the Lot and maintain it as their Principal Place of Residence for a continuous period of at least 6 months, commencing within 12 months of completion of construction of the Home.

## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

---

### **Section 7 – Payment Details**

Applicants must complete this section.

You must nominate an account to receive funds electronically (EFT). The account can belong to a person who is not an Applicant.

Payment of the rebate will be made into the nominated bank account. Provide details of the name of the financial institution, account name, BSB and account number. Failure to provide the correct details may cause delays in payment of the rebate. The Applicants are responsible for ensuring the account details provided are correct.

### **Section 8 – Declaration by Applicant**

All Applicants must sign the declaration and must have read and understood all the details completed on the application form.

### **Section 9 – Declaration by Spouse / De facto Partner**

If an Applicant's Spouse/De facto Partner is NOT an Applicant, they must sign the declaration and must have read and understood all the details completed on the application form as they relate to them.

### **Section 10 – Supporting Document Checklist**

Please supply the required documents with your application and tick off the documents attached. Failure to produce the relevant documentation may result in your application being rejected.

#### **NOTE: PRINCIPAL PLACE OF RESIDENCE REQUIREMENTS**

All Applicants must live in the Home on the Lot as their Principal Place of Residence for at least 6 continuous months commencing within 12 months of completion of construction of the Home.

It is the responsibility of the Applicant to satisfy the Authorised Assessor that they have met the residence requirements. Applicants may be required to verify this later by providing documentation supporting their period of occupancy.

Should you not meet the residence requirements you must advise the Authorised Assessor in writing either within 30 days after the expiration of the 12 month residency period or within 30 days after the date it becomes apparent you will not be able to fulfil the requirement, whichever is the earlier.

The Authorised Assessor may consider your written request if your original circumstances have changed, however you must still occupy the Home as your Principal Place of Residence.

The Authorised Assessor will determine if you are required to repay the grant. Failure to advise the Authorised Assessor in writing will result in the Applicant(s) being required to repay the rebate and also being ineligible for a future rebate.

#### **WARNING:**

The Housing Authority as part of its role in administering the Harrisdale Green Housing Affordability Fund Rebate scheme conducts ongoing investigations to ensure that Applicants comply with the conditions of the scheme. If Applicants receive the rebate when they are not entitled or do not comply with the residence requirements the Applicant will be ineligible for a future rebate and may be subject to prosecution.

Providing incorrect or misleading information is a criminal offence. If it is determined that an Applicant has provided incorrect or misleading information to obtain, or attempt to obtain the rebate, then prosecution action may be commenced.

All applications undergo a rigorous review where Applicants are checked for compliance. Other checks into Spouse/De facto Partner status, council records, title details, income and tax details and finance particulars are undertaken on a routine basis.

## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

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### **HOW TO LODGE YOUR APPLICATION**

You must lodge your application by registered mail with the Authorised Assessor at:

Postal Address:

Harrisdale Green  
RSM Australia Pty Ltd  
GPO Box R1253  
PERTH WA 6844

Email: [Emily.mclarty@rsm.com.au](mailto:Emily.mclarty@rsm.com.au)

Phone: (08) 9261 9100

Fax: (08) 9261 9102

### **PRIVACY STATEMENT**

The information in this form is required by the Authorised Assessor to determine your eligibility for the rebate under the Harrisdale Green Housing Affordability Fund Rebate scheme. By submitting this form you consent to the Authorised Assessor using the information to process your application.

The information will be stored in the Harrisdale Green Housing Affordability Fund Rebate scheme database and your application will be retained by the Authorised Assessor. Information will only be used and disclosed as required or permitted by law or with your consent.

## HOUSING AFFORDABILITY FUND REBATE APPLICATION GUIDE

### TERMS USED:

Applicant	The person or persons who have a Relevant Interest in the Lot and who are making an application to receive the Harrisdale Green Housing Affordability Rebate.
Authorised Assessor	An organisation approved by the WA Housing Authority that is authorised to process applications for the Harrisdale Green Housing Affordability Fund Rebate.
Australian Citizen	A person who is an Australian citizen under the Australian Citizenship Act 2007 of the Commonwealth.
Certified Copy	<p>A true copy of an original document that has been sighted and certified by an authorised person listed below and noted as follows: <b>'I certify that I have sighted the original document and this is a true copy of it.'</b> This certification must have the Certifier's Name, Title, Registration number (where applicable) and be signed and dated.</p> <p>Copies may be certified by the following:</p> <ul style="list-style-type: none"> <li>• Legal practitioner</li> <li>• Member of Parliament</li> <li>• Dentist</li> <li>• Police Officer</li> <li>• Pharmacist</li> <li>• Justice of the Peace (JP)</li> <li>• Public Servant</li> <li>• Veterinary Practitioner</li> <li>• Minister of Religion</li> <li>• Mortgage Broker</li> <li>• Medical Practitioner</li> <li>• Magistrate</li> <li>• Primary or Secondary Teacher</li> <li>• Certified Practising Accountant</li> <li>• Bank Officer</li> </ul>
Combined Taxable Income	The total sum of all income for all Applicants shown on the ATO Notice of Assessment for FY2013 or, if self employed, the most recent BAS statement, or on acceptable payslips.
De facto Partner	A person who, on the Lodgement Date to which the application relates, is living in a de facto relationship with the Applicant and has lived on that basis with the Applicant for at least 2 years.
First Purchaser(s)	The person who purchases the Lot from the Department of Housing.
Home	A building, affixed to land at Harrisdale Green that may be lawfully used as a place of residence and is, in the Authorised Assessor's opinion, suitable for use as a place of residence.
Lodgement Date	The date your application is received by the Authorised Assessor.
Lot	The Lot that the Applicant purchased in the Harrisdale Green Subdivision and to which the application applies.
Newly Created Lot	The Lot was created on a plan of subdivision, which may be a strata plan, by the Housing Authority to which a new Certificate of Title will be or was issued prior to the Settlement Date.
Notifiable Event	When any part of the eligibility criteria is not met, the Applicant(s) must notify the Authorised Assessor within 30 days of the event.
Owner	A person who has a Relevant Interest in the Lot.
Permanent Resident	A person who holds a permanent residency visa (under Section 30 of the Migration Act 1958 of the Commonwealth or a New Zealand citizen who is the holder of a special category visa (under Section 32 of the Migration Act 1958 of the Commonwealth).
Principal Place of Residence	The Home the Applicant primarily resides in. This Home must be occupied by all Applicants for a continuous period of at least 6 months commencing within 12 months of the completion of construction of the Home.
Relevant Interest	A person with a Relevant Interest may be described as someone who has or will have a legal entitlement to the Lot. Usually this will be the person(s) registered as proprietor on the Certificate of Title. Each person acquiring a 'Relevant Interest' must be an Applicant on this form.
Settlement Date	The date that settlement of the purchase of the Lot by the Applicant took place.
Spouse	A person is a spouse of another if they are legally married to each other.
Title Search	A search of the Certificate of Title to the Lot which shows the names of the registered Owners. A Title Search can be obtained from Landgate at <a href="http://www.landgate.wa.gov.au">www.landgate.wa.gov.au</a>

Harrisdale Green Sales Office is located on the corner of Warton and Ranford Roads, Harrisdale.  
[www.harrisdalegreen.com.au](http://www.harrisdalegreen.com.au)