



Revenue Branch  
 1435 Water Street  
 Kelowna, BC V1Y 1J4  
 250 469-8757  
 kelowna.ca/propertytax

**Permissive Tax Exemption Application for  
 Non-Profit Organizations - Comprehensive  
 1 Year Application (2013)**

**APPLICATION DEADLINE**

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Forward your application PRIOR TO JULY 15, 2012 to:

Revenue Branch, City Hall, 1435 Water Street, Kelowna, BC V1Y 1J4  
 Fax: 250 862-3391

**REQUIREMENTS**

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The following items must be submitted with the application:

- ▶ Copy of last Non-Profit Organization Information Return or Registered Charity Information Return submitted to the CRA and Notice of Confirmation
- ▶ Copy of the most recent Audited Financial Statements
- ▶ Financial Budget (Pro-forma Balance Sheet and Income Statement) for Current 12 Months
- ▶ Scale Drawing of Property which includes buildings, parking lots, landscaping, playgrounds, fields, etc.
- ▶ Copy of Lease Agreement if applicable
- ▶ Copy of Caretaker Agreement if applicable

Consideration will only be given to applications with all of the above information submitted.

**APPLICANT INFORMATION**

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Please print clearly.

Application Date:	
For Taxation Year:	2013
Business Number:      BN:	
Society Registration Number:	

1. Full Name or Title of Organization:

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2. Is your organization the registered owner of the property?

- Yes
- No - if No, is the organization a lessee under a lease that requires direct payment of property taxes to the City of Kelowna?
  - Yes - If Yes, attach copy of Lease
  - No - if No, Not Eligible for Permissive Tax Exemption

3. Does anyone live in the building(s) or on the property?

No

Yes,

attached is a caretaker agreement that specifies rent free accommodation in exchange for this service

4. Mailing Address of the Organization:

5. Civic Address of Property if Different than mailing address:

6. Property Legal Description:

Roll # \_\_\_\_\_

Plan: \_\_\_\_\_

Lot: \_\_\_\_\_

7. Contact Person:

Name: \_\_\_\_\_

Phone number(s): \_\_\_\_\_

E-mail: \_\_\_\_\_  
*(preferred communication method)*

8. If the Organization a Registered Charity?

No

Yes

▶ If yes, provide a copy of last Registered Charity Information Return that has been submitted to the CRA along with Notice of Confirmation.

Has the board of directors, property usage, or nature of organization changed since the last submission of Registered Charity Information Return?

No

Yes - If yes, please explain below:

9. If the Organization is not a Registered Charity is it a Non-Profit?

Yes

▶ If yes, provide a copy of the Organization's last Non-Profit Return submitted to the CRA along with Notice of Confirmation, and attach a list of the current board of directors.

No - If No, Not Eligible for Permissive Tax Exemption

10. List all licenses held by Organization (i.e. licenses under the Community Care Facility Act, Hospital Act, Library Act, City of Kelowna Business License, or other)

11. a) Describe the goal(s) or purpose(s) of the Organization:

b) How is the property used to accomplish the Organization's goal(s) or purpose(s)?

12. Size of membership or number of patients or residents utilizing the property.

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13. How will the community and/or participants benefit?

14. Nature of Organization, please tick boxes that apply to your organization:

Community Care Facility licensed under Community Care Facility Act

Short Term Emergency or Protective Housing

- Maximum length of stay permitted? \_\_\_\_\_



16. Has the organization received grants from the City of Kelowna, Senior Government (Provincial or Federal), Local Government, Crown Agencies, or other funding agencies in the last 5 years?

- No
- Yes - if Yes, complete the following:

Year	Purpose of Grant	Amount

17. Is the organization in compliance with all municipal policies, plans, bylaws and other applicable regulations (i.e. business licensing, zoning)?

- Yes
- No - if No, please explain:

I understand that all required information must be attached to this application to be considered for a Permissive Tax Exemption.

I understand that if this application is approved in full or in part for the year, it is our organization's responsibility to complete a comprehensive application or renewal application (as determined by the City of Kelowna), submitting prior to the **15th of July of each year** to be considered for future Permissive Tax Exemption.

I understand that it is our organization's responsibility to contact the City of Kelowna if any changes occur with respect to ownership or principal use of property.

I certify that I am a current board member of this organization and that the information provided in this application and supporting documentation is true and accurate to the best of my knowledge.

Name: \_\_\_\_\_ Signature: \_\_\_\_\_

Position: \_\_\_\_\_ Date: \_\_\_\_\_

*Knowingly submitting an application or information that is not true or accurate will result in loss of eligibility.*