



# Permissive Tax Exemption Application for Places of Worship, Private Schools and Hospitals New Application

## APPLICATION DEADLINE

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Applications are due **PRIOR to JULY 15** of the current year for a subsequent year exemption

Forward your application to:

Revenue Branch, City Hall, 1435 Water Street, Kelowna, BC V1Y 1J4

Email: [revenue@kelowna.ca](mailto:revenue@kelowna.ca) Fax: 250 862-3391

## REQUIREMENTS

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The following items must be submitted with the application:

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

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

## APPLICANT INFORMATION

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Please print clearly.

Application Date:
Full Name or Title of Organization:
Property Roll Number/Plan/Lot:
Civic Address of Property:
Mailing Address (if different from civic address):
Contact Name:
Contact Phone:
Contact Email (Organization & Individual):
Business Number/Society Registration Number:
If a hospital, license number under Hospital Act:

1. Is the organization the registered owner of the property?

- Yes
- No – if No, does the organization have a lease agreement with the City of Kelowna or other public authority and is it required to pay property taxes directly to the City of Kelowna or other public authority?
  - Yes – if Yes, attach copy of lease
  - No – if No, Not eligible for Permissive Tax Exemption

2. Does anyone live on the property?

- No
- Yes
  - attached is a caretaker agreement that specifies rent free accommodation in exchange for this service

3. 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)?

4. Size of congregation, enrolment numbers, or patient numbers utilizing the property.

5. How will the community and/or members benefit?

6. Does the organization have any 3rd party agreements including rentals or use of the building(s), parking lot(s), or services rendered? i.e. Daycare

- No
- Yes – if Yes, indicate the following:

Facility Name	ft² of leased premises	Leased Space Business Type	Rate charged

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

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

Year	Purpose of Grant	Amount

8. 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 additional information may be requested, prior to consideration of this application for a Permissive Tax Exemption.

I understand that if this application is approved in full or part it is our organization’s responsibility to contact the City of Kelowna if changes occur with respect to ownership or 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.*