



Permissive Tax Exemption Application for Non-Profit Organizations New Application

APPLICATION DEADLINE

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 Fax: 250 862-3391

REQUIREMENTS

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 with the City of Kelowna or other public authority if applicable
- ▶ Copy of Caretaker Agreement if applicable

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

APPLICANT INFORMATION (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 your 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 the property 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 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

- 3. Is 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.

- 4. 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:

- 5. 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

- 6. 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)

- 7. 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)?

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

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

10. 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? _____
- Halfway Houses, Group Homes or Supportive Housing for People with Special Needs
 - Maximum length of stay permitted? _____
- Social Services, such as Food Banks, Drop in Centres for People with Special Needs, Seniors, or Youth
- Support Services and Programs for People with Special Needs, who are in some way disadvantaged and need assistance in maximizing their quality of life; such as counselling for substance abuse, or employment re-entry programs

(Attach fee schedules as applicable for the following:

- Athletic Club or Association that has membership to the club or association available to all residents of Kelowna
- Recreational Facility that offers programs to all residents of Kelowna
- Park or Recreational Ground available to all residents of Kelowna
- Cultural Facility available to all residents of Kelowna
- Preservation of Wildlife, Environment or Domestic Animal Shelter
- Other, please describe below:

11. Does your organization have any 3rd party agreements including rental or use of the building(s), parking lot(s), or services rendered? i.e. Daycare
- No
 - Yes – if Yes, indicate the following:

Facility Name	ft ² of leased premises	Leased Space Business Type	Rate charged

12. 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

13. 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.