

Seniors Housing Grant

Application Form & Lodgement Guide

- NOTE:
- Please read the 'Terms used' on page 4 to assist when completing this application.
 - Before lodging the application remove pages 1 to 5 and keep for your reference.

Lodgement Guide

Each applicant should read this information before completing and submitting the application form.

The information in this lodgement guide is for general guidance only. It should not be relied upon to address every aspect of the *First Home and Housing Construction Grants Act 2000*.

To apply:

Applicants must:

- ✓ fully complete the application form and lodge with all relevant supporting documentation;
- ✓ be a *natural person* (i.e. not applying as a company or trust, other than a trustee for a person with a legal disability) and at least one applicant must be aged 60 years or older;
- ✓ be buying or building a *new home* for which the contract was signed on or after 1 July 2014 or building a *home* as an *owner builder* where building commenced on or after 1 July 2014;
- ✓ be buying or building a *new home* for which the total market value of the property does not equal or exceed \$450 000;
- ✓ ensure each person holding a *relevant interest* in the property is an *applicant*;
- ✓ ensure that at least one *applicant*, aged 60 years or older, will reside in the *home* as their *principal place of residence* for a continuous period of at least six months commencing within 12 months of *completion of the eligible transaction*; and
- ✓ lodge an application within 12 months of *completion of the eligible transaction*.

Applicants and their spouse/domestic partner must:

- ✓ not have previously received a Seniors Housing Grant. If a grant was received but later paid back together with any penalty you may be entitled to reapply for the grant; and
- ✓ not have claimed the First Home Owner Grant in relation to the property the application relates to.

Your Obligations

As an *applicant* for the Seniors Housing Grant, you must:

- ensure that the information contained in your application for the grant is complete and correct; and
- notify the *Commissioner*, and repay the grant, if you, or any other applicant, will be unable to fulfil any of the conditions of payment of the grant (including the residence requirement).

NOTE: If you are unsure about any of your obligations, the conditions or the information that is required by the *Commissioner* to determine your eligibility, then it is important that you contact RevenueSA for clarification (Please refer to page 4 for contact details).

How to lodge your application

You can lodge your application with:

- **the approved agent** who is providing your finance. A list of *approved agents* can be found at www.revenuesa.sa.gov.au
If you require the grant for settlement or want to receive the grant as soon as possible, you must lodge your application with an *approved agent*.
- **RevenueSA** - refer to page 3 for contact details.

Supporting evidence

1 Proof of identity & age

If lodging with an approved agent - provide a copy (certification not required) of documents (see below) to evidence identity and age for each *applicant* and their *spouse/domestic partner*.

If lodging with RevenueSA - provide a certified copy of documents (see below) to evidence identity and age for each *applicant* and their *spouse/domestic partner*.
Do not send original documents.

Each *applicant* and their *spouse/domestic partner* must provide document(s) which confirm their identity and age.

Preferred documents are shown below.

- Birth Certificate issued by Government Authority (e.g. Australian Birth Certificate issued by Births, Deaths & Marriages).
- Passport (current).
- Drivers Licence (current).
- Firearms Licence (current).
- Proof of Age Card issued by Department of Transport, Energy and Infrastructure.
- Australian Citizenship Certificate.

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* and/or their *spouse/domestic partner* (e.g. marriage certificate, change of name certificate).

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

If you are:

| | |
|-----------|---|
| Married | a <i>certified*</i> copy of your marriage certificate. |
| Divorced | a <i>certified*</i> copy of your divorce certificate. |
| Widowed | a <i>certified*</i> copy of the death certificate of your <i>spouse/domestic partner</i> . |
| Separated | a Statutory Declaration with the following information: <ul style="list-style-type: none">▪ the name of your former <i>spouse/domestic partner</i>;▪ <i>spouse/domestic partner's</i> date of birth;▪ the date you were married or commenced cohabiting in a domestic partnership;▪ the date you separated;▪ your former <i>spouse/domestic partner's</i> current address (if known); and▪ a statement to the effect that you do not live together and have no intention of resuming cohabitation. |

* If lodging an application with an approved agent, certification is not required

2 Transaction type

Depending on the circumstances of your application, the following is required:

A Contract to purchase a new home or an off-the-plan home:

- a copy of the Contract for Sale, dated and signed by all parties;
- a Confirmation of Settlement form;
- if purchasing a *new home*, documentation evidencing that the property meets the definition of a *new home*, such as a statement from the vendor; and
- if purchasing a home *off-the-plan*, written statement from the developer confirming that the home has been completed and is ready to be occupied, including the date that this occurred.

Related or associated party purchase

Where there is no written contract or the transaction is between family members or *related or associated parties*, you will need to supply **all** of the following:

- a copy of the transfer signed and dated by all parties showing date the duty was paid;
- a Confirmation of Settlement form; and
- evidence that the *consideration* has been paid by the applicant, e.g. provide copies of bank statements of both the vendor and *applicant* showing the payment (withdrawal) and receipt (deposit) of the purchase money at settlement and any copies of loan agreements.

B Contract to build a home:

- a copy of the *Contract to build* dated and signed by all parties; and
- a copy of the first progress payment invoice for the laying of the foundations.

C Owner builder:

- documentary evidence of building costs incurred for the construction of the *home*. The evidence submitted must total an amount equal to or greater than the grant and must not include your own labour costs;
- a copy of any contracts signed (e.g. transportable/kit home); and
- a Statutory Declaration that states that the home is complete and is ready to be occupied as a place of residence, and the date that this occurred.

NOTE: If you are unable to provide the preferred documents, please contact RevenueSA to discuss your circumstances. Refer to page 3 for contact details.

Additional documents may be requested after lodgement of the application in order to confirm eligibility for the grant.

When will the grant be paid?

The date the grant is paid depends on whether you are building or buying a new home, and if you are applying through an *approved agent* or through RevenueSA.

The following table details the various scenarios.

| Type of transaction | Applying through | Payment of grant |
|-------------------------------|-----------------------|--|
| Purchase of a <i>new home</i> | <i>Approved agent</i> | At date of settlement. |
| | RevenueSA | Within five days after approval of the application and when proof of lodgement for registration with the Lands Titles Office is provided (Confirmation of Settlement form). |
| <i>Contract to build</i> | <i>Approved agent</i> | On date of first progress payment by <i>approved agent</i> . |
| | RevenueSA | Within five days of lodging the first progress payment invoice with, and approval of the application by, RevenueSA. |
| <i>Owner builder</i> | <i>Approved agent</i> | When application with appropriate supporting evidence is provided to the <i>approved agent</i> along with a Statutory Declaration stating that the home is complete and ready for occupation as a place of residence. |
| | RevenueSA | Within five days of RevenueSA approving the application lodged with appropriate supporting evidence and receipt of a Statutory Declaration stating that the home is complete and ready for occupation as a place of residence. |

When do I have to move in and for how long?

- At least one *applicant*, aged 60 years or older, must live in the *home* as their *principal place of residence* for at **least six continuous months** commencing **within** 12 months of *completion of the eligible transaction*.
- It is the responsibility of the *applicant* to satisfy the *Commissioner* that the residency requirement has been met. Applicants may be required to verify this later by providing documentation supporting their period of occupancy.
- Should no *applicant*, aged 60 years or older meet the residency requirement, you must contact RevenueSA in writing within 14 days after becoming aware that the requirement will not be met, and repay the grant.

Contact details

Website: www.revenuesa.sa.gov.au

Phone: (08) 8226 3750

8.30 am – 5.00 pm
Monday – Friday

Mail: RevenueSA
GPO Box 1353
ADELAIDE SA 5001

Email: fhog.support@sa.gov.au

Fax: (08) 8226 3737

DX: DX 179
Adelaide

Assistance in community languages is available.

Terms used

Applicant

A person applying for a grant who, on completion of the purchase or construction of a *new home*, will own or hold a *relevant interest* in the land on which the *home* is built.

Approved agent

An organisation approved by RevenueSA that is authorised to process applications for the Seniors Housing Grant.

Certified copy

A true copy of an original document that has been sighted and certified by an authorised person* and noted as follows: **'I certify that I have sighted the original document and this is a true copy of it'**. This certification must have the certifier's name, title, registration number (where applicable) and be signed and dated.

*An authorised person includes a legal practitioner, justice of the peace (JP), registered conveyancer, magistrate, notary public, police officer, bank manager and officers of RevenueSA

Close Associate

Two persons are considered *close associates* if:

- one is a relative (spouse/domestic partner; parent or remoter lineal ancestor; son, daughter or remoter ancestor; or brother or sister) of the other;
- they are related bodies corporate (within the meaning of the *Corporations Act 2001* (Cwlth));
- one is a body corporate and the other is a director, manager or officer of the body corporate;
- one is a body corporate (other than a public company whose shares are quoted on a financial market) and the other is a shareholder in the body corporate;
- one has a right to participate (otherwise as a shareholder in a body corporate) in income or profits derived from a business conducted by the other;
- they are in partnership; or
- one is a beneficiary under a trust or an object of a discretionary trust of which the other is a trustee.

Close Personal Relationship

Means the relationship between two adult persons (whether or not related by family and irrespective of their gender) who live together as a couple on a genuine domestic basis, but does not include the relationship between a legally married couple; or a relationship where one of the persons provides the other with domestic support or personal care (or both) for fee or reward, or on behalf of some other person or an organisation of whatever kind.

NOTE: Two persons may live together as a couple on a genuine domestic basis whether or not a sexual relationship exists, or has ever existed, between them.

Commencement date of the eligible transaction

Date of contract to purchase or build a *new home*, or for an *owner builder* - date the foundations commenced to be laid.

Commissioner

Commissioner of State Taxation, RevenueSA.

Completion of the eligible transaction

Subject to any qualifications prescribed by legislation, an *eligible transaction* is completed when:

- in the case of a contract for the purchase of a *new home*:
 - the purchaser becomes entitled to possession of the home under the contract; and
 - if the purchaser is to obtain a registered title to the land on which the home is situated - the necessary steps to obtain registration of the purchaser's title have been taken;

- in the case of a contract to have a home built the building is ready for occupation as a place of residence;
- in the case of the building of a home by an *owner builder* - the building is ready for occupation as a place of residence.

Contract to build

A comprehensive building contract where a builder agrees to build a *home*, from the time the building starts to when it is finished and is ready for occupation.

Consideration

Purchase price or cost of construction of the *home*.

Domestic Partner

A person is the *domestic partner* of another if they live together in a *close personal relationship*.

Eligible transaction

Contract for the purchase of a *new home*, *contract to build a home* or construct a *home* as an *owner builder* on or after 1 July 2000.

Genuine Farm

The land is to be used for primary production by the applicant(s) seeking the SHG, and the land is, by itself or in conjunction with other land owned by the applicant(s), capable of supporting economical viable primary production operations.

The relevant component of the genuine farm for the purposes of determining the value for the SHG is the home and curtilage or the part of the land that is to constitute the site and curtilage of the home that is to be built.

Home

A building, affixed to land, that may be lawfully used as a place of residence and is, in the *Commissioner's* opinion, suitable for use as a place of residence.

Market Value

In the case of a contract for the purchase of a *new home*, the market value is the greater of:

- the consideration for the eligible transaction; or
- the market value of the property on which the home is situated, as at the *commencement date of the eligible transaction*.

In the case of a *contract to build*, the market value is calculated by adding together:

- the consideration for the comprehensive home building contract, or if the Commissioner considers that the total consideration payable for the building work may be less than the actual costs to build the home - the actual costs to build the home; and
- the market value of the property on which the home is to be built, as at the time when the building contract is made.

In the case of an *owner builder*, the market value is taken to be:

- the market value of the property on which the home is situated at the time the eligible transaction is completed and ready for occupation as a place of residence.

Natural person

A person (does not include a company or trust).

New home

A *home* that has not been previously occupied or sold as a place of residence including a substantially renovated home. Refer to the RevenueSA website for further information.

Notifiable event

When any part of the eligibility criteria is not met, the *applicant(s)* must notify the *Commissioner* within 14 days of the event.

An example would be where an *applicant* is not able to occupy the *home* as their *principal place of residence* within 12 months of *completion of the eligible transaction*.

Off the plan

A contract for the purchase of the *home* on a proposed lot in an unregistered plan of a subdivision of land.

Owner

A person who has a *relevant interest* in land on which a *home* is built.

Owner builder

An *owner* of land who builds a *home* or has a *home* built, on the land without entering into a *Contract to build*.

Principal place of residence

The *home* primarily resided in. This *home* must be occupied by at least one *applicant*, aged 60 years or older, for a continuous period of at least six months commencing within 12 months of the *completion of the eligible transaction*.

Related or associated party

A person is related to or associated with another party when:

- i) one is the *spouse/domestic partner* of the other;
- ii) they are related by blood, marriage or adoption;
- iii) they are a shareholder or director of the other party, being a company;
- iv) they are a beneficiary of a trust for which the other party is a trustee; or
- v) the transaction is otherwise not at arm's length.

Relevant interest

A person with a *relevant interest* may be described as someone who will have a legal entitlement to occupy the *home* being bought or constructed. Usually this will be the person(s) registered as proprietor on the Title. This commonly is an estate in fee simple. Other forms of interest are defined in the *First Home and Housing Construction Grants Act 2000*. Each person acquiring a *relevant interest* must be an applicant on this form.

Residential property

Land in Australia on which there is a *home* which is lawfully occupied or suitable for occupation. This includes houses, townhouses, units, flats, duplexes, converted warehouses and fixed moveable homes.

Spouse

A person is the spouse of another if they are legally married.

Substantially renovated home

A *home* is a substantially renovated home if:

- the sale of the *home* is, under the *A New Tax System (Goods and Services Tax) Act 1999* (Cwlth), a taxable supply as a sale of new residential premises within the meaning of Section 40-75(1)(b) (Meaning of new residential premises); and
- the *home*, as renovated, has not been previously occupied or sold as a place of residence.

Title search

A search on the land which shows the names of the registered owners.

A *title search* can be obtained from the Department for Transport, Energy and Infrastructure, Land Services Group, Lands Titles Office at www.landservices.sa.gov.au

Guide to completing the application

The Senior Housing Grant application form has eight sections. These sections must be completed as follows:

Section 1 Eligibility criteria

Answer questions 1 to 6 by ticking the relevant 'yes' or 'no' box. The answers are designed to establish that the applicant(s) for the grant meet the eligibility criteria.

All persons with a *relevant interest* (refer to 'terms used') in the property, and any *spouse/domestic partner* of these persons, must be considered when answering these questions.

In exceptional circumstances, the *Commissioner* may use discretion relating to the eligibility criteria. Please contact RevenueSA for further information.

All decisions relating to the eligibility of an *applicant* are made by the *Commissioner*.

Section 2 Applicant details

Detail the number of persons with a *relevant interest*. All persons who have, or will have, a *relevant interest* in the property 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/domestic partner*, there are two options. If your *spouse/domestic partner* is an *applicant*, they must be recorded within this section. If your *spouse/domestic partner* is not an *applicant*, they are required to complete the details in Section 3 of the application form.

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

Section 3 Spouse/domestic partner details

This section must be completed by the *applicant* in relation to the *spouse/domestic partner* of the *applicant* who has not already been specified as an *applicant* (and therefore will have no *relevant interest* in the *residential property*). If this section is required to be completed the *spouse/domestic partner* must complete the Declaration in Section 7.

Section 4 Property and transaction details

Provide the current Title (Volume and Folio number) details of the property. The Title identifier number can be obtained from the transfer document, a *title search* or the Contract for Sale and Purchase. If the Title number is unavailable, enter the parent Title number.

Provide the expected date of occupancy as *owner* of the *home*. Estimate this date if you are unsure. To be eligible for the grant at least one *applicant*, aged 60 years or older, must move into the *home* and occupy it as their *principal place of residence* for a continuous period of at least six months, commencing within 12 months of *completion of the eligible transaction*.

Provide the *market value* of the property.

Section 5 Payment details

Applicants must complete this section only if applying through RevenueSA.

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 grant will be made into the nominated bank account. Provide details of the name of financial institution, account name, BSB and account number. Failure to provide correct details will cause delays in payment of the grant.

If you are applying through an *approved agent*, the agent will record all your payment details.

Section 6 Declaration by applicant

All *applicants* must sign the Declaration and must have read and understood all the details completed on the application form.

Section 7 Declaration by spouse/domestic partner

If an *applicant's spouse/domestic partner* is not an *applicant*, they must sign this Declaration and must have read and understood all details completed on the application form as they relate to them.

Section 8 Supporting documentation checklist

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

Penalties

RevenueSA, as part of its role in administering the *First Home and Housing Construction Grants Act 2000*, conducts ongoing investigations to ensure that *applicants* comply with the conditions of the Act. If *applicants* receive the grant when they are not entitled, or do not comply with the residency requirement, penalties and interest may be imposed. The amount of any penalty which may apply is dependant on the circumstances of each case and is in addition to having to repay the grant. In some circumstances the penalty applied is equal to the amount of the grant received.

Providing incorrect or misleading information in this application

Dishonestly providing incorrect or misleading information to RevenueSA **is a criminal offence**. If it is determined that an *applicant* has provided incorrect or misleading information to obtain, or attempt to obtain the grant, then legal action may be commenced.

All applications undergo a rigorous review to establish compliance with legislation, including but not limited to, investigations into spouse/domestic partner status, council records, title details and financial particulars.

How to lodge this application

- For payment to be available at settlement, lodge with the *approved agent* who is processing your mortgage.
- For payment to be available after the first progress payment invoice has been issued, lodge with the *approved agent* who is processing your mortgage or in person or by mail to RevenueSA.
- For payment after *completion of the eligible transaction*, lodge in person or by mail to RevenueSA.

NOTE: Read more details about *approved agents* at www.revenuesa.sa.gov.au or phone (08) 8226 3750.

Confidential information

All information collected by RevenueSA is protected by the secrecy provisions of the *First Home and Housing Construction Grants Act 2000*. Any information collected from you is only used for the purposes of the Acts administered by RevenueSA. Information (including personal information) is not disclosed to third parties unless authorised by law, or with your consent.

First Home and Housing Construction Grants Act 2000

Application for Seniors Housing Grant

NOTE:

- This application will not be accepted unless fully completed, signed in blue or black ink and all required supporting evidence is lodged.
- Read the lodgement guide for explanations of the terms used in this application.
- Applications must be lodged within 12 months of *completion of the eligible transaction*.
- There are significant penalties for making a false or misleading statement, as well as possible prosecution.
- Please answer all questions and tick the appropriate boxes.

OFFICE USE ONLY

| | |
|-------------------------|--|
| UIN | <input type="text"/> |
| Application reference | <input type="text"/> |
| Application received by | <input type="text"/> |
| Date lodged | <input type="text"/> / <input type="text"/> / <input type="text"/> |

SECTION 1 Eligibility criteria

- NOTE:**
- Eligibility is determined as at the date of lodgement of the application.
 - All *applicants* and their *spouse/domestic partner* must be considered when answering eligibility questions.

Eligibility checklist

| | YES | NO |
|--|--------------------------|--------------------------|
| 1. Is this the first time each <i>applicant</i> and/or their <i>spouse/domestic partner</i> will receive a Seniors Housing Grant under the <i>First Home and Housing Construction Grants Act 2000</i> ? | <input type="checkbox"/> | <input type="checkbox"/> |
| 2. Is each <i>applicant</i> a <i>natural person</i> (that is not a company), and who does or will on completion of the transaction, own the property in their own right and not in any capacity as a trustee? | <input type="checkbox"/> | <input type="checkbox"/> |
| 3. Is at least one <i>applicant</i> aged 60 years or older? | <input type="checkbox"/> | <input type="checkbox"/> |
| 4. Will at least one <i>applicant</i> (aged 60 years or older) be occupying the <i>home</i> as their <i>principal place of residence</i> for a continuous period of at least six months commencing within 12 months of <i>completion of the eligible transaction</i> ? | <input type="checkbox"/> | <input type="checkbox"/> |
| Name of <i>applicant(s)</i> residing in property <input type="text"/> | | |
| 5. Has an <i>applicant</i> on or after 1 July 2014 , either: <ul style="list-style-type: none"> ▪ entered into a contract for the purchase of a <i>new home</i> in South Australia; ▪ entered into a contract to have a <i>home</i> built in South Australia; OR ▪ in the case of an <i>owner builder</i>, commenced construction of a <i>home</i> in South Australia (i.e. laying of foundations)? | <input type="checkbox"/> | <input type="checkbox"/> |
| 6. Is the Seniors Housing Grant the only grant being claimed (or applied for)? That is the First Home Owner Grant has not been claimed or applied for in relation to the property in this application. | <input type="checkbox"/> | <input type="checkbox"/> |

Determination of eligibility

If you answered 'YES' to ALL of the above questions, you may be entitled to receive the Seniors Housing Grant subject to the written decision being made by the *Commissioner*.

Please attach additional information (where applicable) to support your eligibility for the Seniors Housing Grant.

SECTION 2 Applicant details

- NOTE:
- It is essential that **ALL** applicants must complete this section.
 - If there are more than two applicants, please complete and attach an additional application form.
 - Each applicant must sign the 'Declaration by applicant' at Section 6.

Number of applicants

How many people will have a *relevant interest* in the property?

Related or associated party transactions

Are any of the *applicants* or their *spouse/domestic partner(s)* related to or associated with the vendor or builder?

Yes No
 If yes, please provide evidence of the *consideration* paid. (Refer to lodgement guide).

| | Applicant 1 (Contact applicant) | Applicant 2 |
|--|---|---|
| Title | <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr | <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr |
| First name | <input type="text"/> | <input type="text"/> |
| Middle name(s) | <input type="text"/> | <input type="text"/> |
| Family name | <input type="text"/> | <input type="text"/> |
| Name on birth certificate (if different from above) | First name | First name |
| | Middle Name(s) | Middle Name(s) |
| | Family Name | Family Name |
| Have you ever used any name other than the name(s) declared above? | <input type="checkbox"/> Yes - list name(s) below <input type="checkbox"/> No | <input type="checkbox"/> Yes - list name(s) below <input type="checkbox"/> No |
| | <input type="text"/> | <input type="text"/> |
| Date of birth | <input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y | <input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y |
| Place of birth | State/territory | State/territory |
| | Country | Country |
| Daytime telephone number | (<input type="text"/>) <input type="text"/> | (<input type="text"/>) <input type="text"/> |
| Email address | <input type="text"/> | <input type="text"/> |
| Current residential address | Street No. | Street No. |
| | Street Name | Street Name |
| | Suburb/Town | Suburb/Town |
| | State <input type="text"/> Postcode <input type="text"/> | State <input type="text"/> Postcode <input type="text"/> |
| Address for service of notices (if different from above) | Street No. | Street No. |
| | Street Name | Street Name |
| | Suburb/Town | Suburb/Town |
| | State <input type="text"/> Postcode <input type="text"/> | State <input type="text"/> Postcode <input type="text"/> |
| Do you have a <i>spouse/domestic partner</i> ? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| If you have a <i>spouse/domestic partner</i> , will your <i>spouse/domestic partner</i> have a <i>relevant interest</i> in the home? | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | <input type="checkbox"/> Yes <input type="checkbox"/> No | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| | If 'Yes', your <i>spouse/domestic partner</i> must complete the details as <i>applicant 2</i> above. | If 'Yes', and your <i>spouse/domestic partner</i> is not <i>applicant 1</i> , they must complete and attach an additional application form. |
| | If 'No', your <i>spouse/domestic partner</i> must complete Section 3 - <i>spouse/domestic partner</i> details. | If 'No', your <i>spouse/domestic partner</i> must complete Section 3 - <i>spouse/domestic partner</i> details. |

SECTION 3 Spouse/domestic partner details

- NOTE:
- This section must be completed where the *spouse/domestic partner* of an *applicant* **has not been specified as an applicant** in Section 2 of the application.
 - An **Applicant's spouse/domestic partner must sign the spouse/domestic partner Declaration at Section 7.**

| | Spouse/domestic partner of Applicant 1 | Spouse/domestic partner of Applicant 2 |
|--|---|---|
| Title | <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr | <input type="checkbox"/> Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/> Dr |
| First name | <input type="text"/> | <input type="text"/> |
| Middle name(s) | <input type="text"/> | <input type="text"/> |
| Family name | <input type="text"/> | <input type="text"/> |
| Name on birth certificate (if different from above) | First name <input type="text"/> | First name <input type="text"/> |
| | Middle Name(s) <input type="text"/> | Middle Name(s) <input type="text"/> |
| | Family Name <input type="text"/> | Family Name <input type="text"/> |
| Have you ever used any name other than the name(s) declared above? | <input type="checkbox"/> Yes - list name(s) below <input type="checkbox"/> No | <input type="checkbox"/> Yes - list name(s) below <input type="checkbox"/> No |
| | <input type="text"/> | <input type="text"/> |
| Date of birth | <input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y | <input type="text"/> D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y |
| Place of birth | State/territory <input type="text"/> | State/territory <input type="text"/> |
| | Country <input type="text"/> | Country <input type="text"/> |
| Daytime telephone number | (<input type="text"/>) <input type="text"/> | (<input type="text"/>) <input type="text"/> |

SECTION 4 Property and transaction details

Address of Property

Lot No Unit No Street No Street name

Suburb/Town State S A Postcode

Date when occupation as a *principal place of residence* commenced or is intended to commence (If not known please estimate) D D M M 2 0 Y Y

Title details

Volume Folio

What type of transaction does this application refer to? Please tick one: (See page 5 of Lodgement Guide for descriptions)

Contract to build Please complete section 4A

New home Please complete section 4B

Owner builder Please complete section 4C

Off-the-plan Please complete section 4D

Does the transaction relate to the purchase or construction of a home on a *genuine farm*?

No Yes If 'Yes', please advise the value of home and curtilage area. \$

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All evidence sighted

Name of person sighting evidence

Payment eligibility date

D D M M 20 Y Y

(Enter settlement, completion or first drawn down date only)

Accepted property value

\$

If you have entered into a contract to **build a new home** complete

Section 4A

If you have entered into a contract to **buy a new home** (not being a contract to buy a *new home off-the-plan*) complete

Section 4B

If you are an **owner builder** who has constructed a *new home* complete

Section 4C

If you have entered into a contract to buy a *new home off-the-plan* complete

Section 4D

SECTION 4A Contract to build a *new Home*

To be eligible for a SHG you must meet the following eligibility criteria:

You have entered into a contract to build a *new home* **between 1 July 2014 and 30 June 2016** (inclusive).

EVIDENCE REQUIRED: Original or copy of the building contract, first progress invoice and a copy of your land purchase contract or council rates notice.

Contract date

The contract specifies a construction completion date for building work **within 18 months** of the construction commencing, or the construction was completed **within 18 months** of commencing.

NOTE: The construction completion date is the construction completion date stated in the contract. If not stated in the contract, you cannot apply unless the building is ready for occupation as a place of residence within 18 months of laying the foundations.

Construction completion date

Construction Price (A) \$

Land Value (B) \$
at date of contract

Total (A + B) \$

SECTION 4B Contract to buy a *new home*

To be eligible for a SHG you must meet the following eligibility criteria:

You have entered into a contract to buy a *new home* **between 1 July 2014 and 30 June 2016** (inclusive).

EVIDENCE REQUIRED: Original or a copy of contract must be provided.

Contract date

The contract is for the **first sale** of the home.

Settlement Date

The home has not previously been occupied.

EVIDENCE REQUIRED: Please provide a written statement from the vendor confirming that the property meets the above requirements. If lodging your application with RevenueSA, please also complete and attach a Confirmation of Settlement Form.

Purchase Price \$

SECTION 4C *Owner Builder*

To be eligible for a SHG you must meet the following eligibility criteria:

You commenced building a *new home* as an owner builder **between 1 July 2014 and 30 June 2016** (inclusive).

Commencement of construction date*
* laying of foundations

The construction was completed **within 18 months** of the construction commencing.

Construction completion date

NOTE: The construction completion date is the actual date the building was ready for occupation as a place of residence. You should not apply until the building is ready for occupation as a place of residence.

EVIDENCE REQUIRED: Please provide copies of any contracts signed, documentary evidence (e.g. receipts, invoices) of building costs incurred, a copy of your land purchase contract or council rates notice, and a Statutory Declaration that states that the home is complete and ready to be occupied as a place of residence, including the date this occurred.

Market Value \$
of the property as at the time when the building is complete and ready for occupation as a place of residence.

SECTION 4D Contract for an *off-the-plan* purchase of a *new home*

To be eligible for a SHG you must meet the following eligibility criteria:

You have entered into a contract to buy a *new home* off-the-plan **between 1 July 2014 and 30 June 2016** (inclusive).

EVIDENCE REQUIRED: Original or a copy of contract must be provided.

Contract date

The contract specifies a construction completion date for building work **on or before 31 December 2017** or construction been completed **on or before 31 December 2017**.

Construction completion date

NOTE: The completion date is the completion date stated in the contract. If not stated in the contract, the eligible transaction is required to be completed on or before 31 December 2017.

EVIDENCE REQUIRED: Please provide a written statement from the developer confirming that the home has been completed and is ready to be occupied, including the date this occurred. If lodging your application with RevenueSA, please also complete and attach a Confirmation of Settlement Form.

Purchase Price \$

SECTION 5 Payment details

- NOTE:
- If applying with **RevenueSA**, the grant will be paid by electronic funds transfer into the account nominated below.
 - If you are applying with an *approved agent*, please **DO NOT** complete the account details below as the grant will be paid through the *approved agent*.

| | |
|--|--|
| Name of financial institution and branch | <input type="text"/> |
| Account name (e.g. John & Jane Citizen) | <input type="text"/> |
| BSB Number (must have 6 numbers) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Account number (maximum of 9 numbers) | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |

* DO NOT include dashes or spaces

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Applicant reference

SECTION 6 Declaration by applicant(s)

- I have completed this application form and I declare that all copies of documents attached in support of this application are a true copy of the original.
- I declare that the information provided in this application is to my knowledge true and correct.
- I declare that I have not previously received and retained a Seniors Housing Grant under the *First Home and Housing Construction Grants Act 2000* in relation to the property.
- I declare that I own the property in my own right and not in any capacity as a trustee.
- I declare that at the date of lodgement of this application **at least one applicant** is aged 60 years or older.
- I declare that the transaction to which my application relates does not equal or exceed the \$450 000 threshold.
- At least one *applicant*, aged 60 years or older, will be residing in the home that is subject of this application as their *principal place of residence* for a **continuous period of six months** commencing within 12 months of *completion of the eligible transaction*.
- For an *owner builders*: I declare that the home is complete and ready for occupation as a place of residence.
- I undertake to notify the Commissioner of any notifiable event in writing relevant to the requirements under the *First Home and Housing Construction Grants Act 2000* within 14 days from the occurrence of the *notifiable event*.
- I declare that the contract referred to in this application is not replacing a contract made prior to 1 July 2014.
- I understand that I must have proof that the above information is correct and must provide evidence of such proof where requested.
- I have read and understood the information prepared by RevenueSA relating to the conditions of eligibility. I accept that if the conditions are not met, I may not be entitled to receive or retain the Seniors Housing Grant.
- I authorise RevenueSA to access and exchange information about me that may affect the *applicant's* eligibility for the Seniors Housing Grant with the *approved agent* (where applicable), other state, territory and Australian government agencies and commercial organisations as permitted by law.
- I acknowledge that I may be prosecuted for dishonestly making a false or misleading statement on or in connection with this application. Maximum penalty: \$20 000 or two years imprisonment.
- I understand that the *approved agent* is not authorised by RevenueSA to offer any advice or assistance on the eligibility of the Seniors Housing Grant, or on the completion of this application.
- I authorise the *approved agent* to hold the Seniors Housing Grant until completion of the *eligible transaction* and to repay the Seniors Housing Grant to the *Commissioner* if the transaction is not completed within 28 days of the date specified.
- I acknowledge that I may be required to repay the Seniors Housing Grant, be liable for penalties and may also be prosecuted for dishonestly making a false and misleading statement in or in connection with this application for the Seniors Housing Grant.
- I authorise RevenueSA to deposit the Seniors Housing Grant into the account nominated in Section 5 (ensure account details are correct) or into the *approved agent's* nominated account when lodged with an *approved agent*.

| | Applicant 1 | Applicant 2 |
|--------------------------------------|---|---|
| Name | <input type="text"/> | <input type="text"/> |
| Signature | <input type="text"/> | <input type="text"/> |
| Date | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> | <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Before me (signature of witness)* | Signature <input type="text"/> | Signature <input type="text"/> |
| Full name and address of witness | Name <input type="text"/> | Name <input type="text"/> |
| | Street No. <input type="text"/> | Street No. <input type="text"/> |
| | Street Name <input type="text"/> | Street Name <input type="text"/> |
| | Suburb/Town <input type="text"/> | Suburb/Town <input type="text"/> |
| | State <input type="text"/> | State <input type="text"/> |
| | Postcode <input type="text"/> | Postcode <input type="text"/> |

* Witness must not be an *applicant* or *spouse/domestic partner* of an *applicant* and must not be related to the *applicant* or *spouse/domestic partner*

SECTION 7 Declaration by spouse/domestic partner(s)

- I declare that the *spouse/domestic partner* details in Section 3, in so far as they relate to me, are true and correct.
- I declare that I have not previously received and retained the Seniors Housing Grant under the *First Home and Housing Construction Grants Act 2000*, either alone or together with any other person or persons.
- I authorise RevenueSA to access and exchange information about me that may affect the *applicant's* eligibility for the Seniors Housing Grant with the *approved agent* (where applicable), other state, territory and Australian government agencies and commercial organisations as permitted by law.
- I acknowledge that I may be prosecuted and fined for dishonestly making a false or misleading statement on or in connection with this application for the grant.

| | Spouse/domestic partner of Applicant 1 | Spouse/domestic partner of Applicant 2 |
|--------------------------------------|---|---|
| Name | <input type="text"/> | <input type="text"/> |
| Signature | <input type="text"/> | <input type="text"/> |
| Date | <input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="2"/> <input type="text" value="0"/> <input type="text" value="Y"/> <input type="text" value="Y"/> | <input type="text" value="D"/> <input type="text" value="D"/> <input type="text" value="M"/> <input type="text" value="M"/> <input type="text" value="2"/> <input type="text" value="0"/> <input type="text" value="Y"/> <input type="text" value="Y"/> |
| Before me (signature of witness)* | <input type="text" value="Signature"/> | <input type="text" value="Signature"/> |
| Full name and address of witness | <input type="text" value="Name"/> | <input type="text" value="Name"/> |
| | <input type="text" value="Street No."/> | <input type="text" value="Street No."/> |
| | <input type="text" value="Street Name"/> | <input type="text" value="Street Name"/> |
| | <input type="text" value="Suburb/Town"/> | <input type="text" value="Suburb/Town"/> |
| | <input type="text" value="State"/> <input type="text" value="Postcode"/> | <input type="text" value="State"/> <input type="text" value="Postcode"/> |

* Witness must not be an *applicant* or *spouse/domestic partner* of an *applicant* and must not be related to the *applicant* or *spouse/domestic partner*

Lodgement of your Application

- For payment to be available at settlement, lodge with the *approved agent* who is processing your mortgage.
- For payment to be available after the first progress payment invoice has been issued, lodge with the *approved agent* who is processing your mortgage or in person or by mail to RevenueSA.
- For payment after *completion of the eligible transaction*, lodge in person or by mail to RevenueSA.

NOTE: Read more details about *approved agents* at www.revenuesa.sa.gov.au or phone (08) 8226 3750.

If lodging with RevenueSA please post to:

GPO Box 1353
ADELAIDE SA 5001

SECTION 8 Supporting documentation checklist

- NOTE:
- To ensure your application is processed in a timely manner, make sure the application is fully completed, signed and dated.
 - Please complete the checklist to ensure you have attached the required supporting documentation defined in the lodgement guide. Attach these papers to this page.
 - Your application may be returned to you if not fully completed or all the required supporting documentation is not attached.
 - Additional documents may be requested after lodgement of your application.

Supporting documentation checklist

NOTE: Refer to the lodgement guide for the documentation required.

Applicant
to tick if
attached

Approved
agent or
RevenueSA
use only

Proof of identity and age of all *applicants* and their *spouse/domestic partner*

NOTE: For applications lodged with RevenueSA - do NOT send original documents, **only send certified copies**.
For applications lodged with Approved Agents - Certification is not required.

| | | | |
|---|--|--------------------------|--------------------------|
| Type of document submitted | | <input type="checkbox"/> | <input type="checkbox"/> |
| Type of document submitted | | <input type="checkbox"/> | <input type="checkbox"/> |
| Type of document submitted | | <input type="checkbox"/> | <input type="checkbox"/> |
| Type of document submitted | | <input type="checkbox"/> | <input type="checkbox"/> |
| <ul style="list-style-type: none"> a marriage, divorce or death certificate or change of name certificate. a statutory declaration for those who are separated. | | <input type="checkbox"/> | <input type="checkbox"/> |

Transaction type

Contract to purchase a new home or an off the plan home

- a copy of your Contract for Sale, dated and signed by the vendor and purchaser.
- a Confirmation of Settlement form.
- if purchasing a new home, documentation evidencing that the property meets the definition of a new home, such as a statement from the vendor.
- if purchasing a home off the plan, written statement from the developer confirming that the home has been completed and is ready to be occupied, including the date this occurred.

Where there is no contract, or the sale of the property is between family members or *related*

or associated parties:

- a stamped and dated copy of the transfer signed by all parties.
- a Confirmation of Settlement form.
- evidence that consideration has been paid.

Contract to build a home

- a copy of your *Contract to build* dated and signed by all parties.
- a copy of the first progress payment invoice for the laying of the foundations.

Owner builder

- a copy of all major receipts for building costs incurred for the construction of the *home*, e.g. foundations/stumps, timber framing, cladding, plumbing, electricity, roofing, kitchen. The evidence submitted must not include your own labour costs.
- Statutory Declaration that states that the *home* is complete, and is ready to be occupied as a place of residence, and the date that this occurred.

Related or associated party

- Please refer to page 2 of the lodgement guide.

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Name of person sighting the documentation above

Name of employer

Signature

Date