EF-267-A-R23-0522-06000075-1

BOE-267-A (P1) REV. 23 (05-22)

## 20 \_\_\_\_ CLAIM FOR WELFARE EXEMPTION (ANNUAL FILING)

CALIFORNIA COLINIA

# Arnold Gross Jr. Colusa County Assessor

547 Market St., Suite 101 Colusa, CA 95932 (530) 458-0450

To receive the full exemption, a claimant must complete and file this form with the Assessor by February 15.

Organization Name and Mailing Address: (Make necessary corrections in

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.  SIGNATURE OF CLAIMANT  TITLE  DATE	ink to the printed name and address.)	Property Location:					
Last year your organization received the Welfare Exemption for all or part of the property your organization owns at the location listed above. To continue receiving the exemption for the property your organization owns at the location listed above. To continue receiving the exemption for the property use of the stressor. As eparate claim forms in organized for each foeathon. The Assessor may contain your cadeformal information.  A if you no longer seek an exemption at this location, check here		This organization owns rents/leases the real property at this location:					
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receiving the exemption for the property you own at this location, you must complete, sign and return this claim form to the Assessor. A separate claim form to run to receive the control of the property in the control of the property and the property and return this form to the Assessor. Date Vacated:  B. If your organization is dissolved and therefore no longer needs an Organizational Clearance Certificate, check here  B. If your organization have a valid Organizational Clearance Certificate (OCC) issued by the State Board of Equalization?  D. Does your organization have a valid Organizational Clearance Certificate (OCC) issued by the State Board of Equalization?  Press, netro CCO No.  and date issued  D. Does your organization have a valid Organizational Clearance Certificate (OCC) issued by the State Board of Equalization, County-Assessed Properties Division, P.O. Box 94279, Sacramento, CA 94279-0084. Please include your OCC number. Note to Assessor's Office: If the organization is dissolved or the formative documents were amended, please forward a copy of the samedment to the State Board of Equalization, County-Assessed Properties Division, P.O. Box 94279, Sacramento, CA 94279-0084. Please include your OCC number. Note to Assessor's Office: If the organization is dissolved or the formative documents were amended, please forward a copy of this page to the Board of Equalization.  Read the information on the reverse side before completing. All questions must be answered. If the answer to any question is "YES," explain in an attachment or complete the referenced form. Contact the Assessor's all any forms referenced below are needed to complete this application. Identify the property that pour organization owns at this location:  Real property (Inarbiudings/improvements) Personal property  Real property (Inarbiudings/improvements)  Real proper		Property No.: Class:					
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C. Check, If changed within the last year:   Mailing Address   Organization Name   D. Does your organization have a valid Organizational Clearance Certificate (OCC) issued by the State Board of Equalization?   Yes   No   If yes, enter COC No   and date issued   E. Have you amended the organization's formalive documents (i.e., articles of incorporation, constitution, trust instrument, articles of organization) since last year?   Yes   No   If yes   not   Yes   places mail at copy of the amendment to the State Board of Equalization. County-Assessed Properties Division, P.O. Box 942879, Sacramento, CA 94279-0064. Please include your OCC number. Note to Assessor's Office: If the organization is dissolved or the formative documents were amended, please forward a copy of this page to the Board of Equalization.  **Read the information on the reverse side before completing. **All questions must be answered. If the answer to any question is "YES," explain in an attachment or complete the referenced form. Contact the Assessor's any forms referenced below are needed to complete this application. Identify the property (land/buildings/mprovements)   Personal property   Taxable Possessory Interest      Real property (land/buildings/mprovements)   Personal	A. If you no longer seek an exemption at this location, check here, sign a	nd return this form to the Assessor. Date Vacated:					
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if yes, enter OCC No	C. Check, if changed within the last year: Mailing Address	Organization Name					
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Transitional / emergency shelter    Low-income housing (check one)   Owned by a non-profit organization or eligible limited liability company, <u>submit BOE-267-L</u>   Owned by a limited partnership, <u>submit BOE-267-L</u> 1   Housing for senior or handicapped, <u>submit BOE-267-L</u> 1   Housing quarters associated with a rehabilitation program, <u>submit BOE-267-R</u> 1   Other - If you claim exemption for this portion, submit documentation including the occupant's position or role in the organization, with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)   G. Do other persons or organizations use any of this property? If <b>yes</b> , <u>submit BOE-267-Q</u> if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.   7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If <b>yes</b> , see "Unrelated Business Taxable Income" on the reverse.   8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If <b>yes</b> , attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.   9. Is there any equipment or property at this location that is leased or rented to he claimant? If <b>yes</b> , provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.    DAYTIME TELEPHONE ( )	formal rehabilitation program may be exempt if BOE-267-R is	filed with this claim.)					
Low-income housing (check one)	5. Is any portion of the property used for living quarters? If yes, of	check one:					
Owned by a non-profit organization or eligible limited liability company, submit BOE-267-L  Owned by a limited partnership, submit BOE-267-L1 unless care or services are provided or the property is financed by the federal government under, but not limited to, sections 202, 231, 236, or 811 of the Federal Public Laws.  Living quarters associated with a rehabilitation program, submit BOE-267-R  Other - If you claim exemption for this portion, submit documentation including the occupant's position or role in the organization, with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)  O on other persons or organizations use any of this property? If yes, submit BOE-267-O if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.  7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If yes, see "Unrelated Business Taxable Income" on the reverse.  8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If yes, attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.  SIGNATURE OF CENTACT FOR ADDITIONAL INFORMATION (please print)  I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.  EMAIL ADDRESS	☐ Transitional / emergency shelter						
Owned by a limited partnership, submit BOE-267-L1   Housing for senior or handicapped, submit BOE-267-H unless care or services are provided or the property is financed by the federal government under, but not limited to, sections 202, 231, 236, or 811 of the Federal Public Laws.   Living quarters associated with a rehabilitation program, submit BOE-267-R   Other - If you claim exemption for this portion, submit documentation including the occupant's position or role in the organization, with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)   O bo other persons or organizations use any of this property? If yes, submit BOE-267-Q if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.   O in this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If yes, see "Unrelated Business Taxable Income" on the reverse.   8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If yes, attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.   9. Is there any equipment or property at this location that is leased or rented to the claimant? If yes, provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.    NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)   DAYTIME TELEPHONE (	Low-income housing (check one)						
Housing for senior or handicapped, <u>submit BOE-267-H</u> unless care or services are provided or the property is financed by the federal government under, but not limited to, sections 202, 231, 236, or 811 of the Federal Public Laws.  Living quarters associated with a rehabilitation program, <u>submit BOE-267-R</u> Other - If you claim exemption for this portion, submit documentation including the occupant's position or role in the organization, with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)  O bo other persons or organizations use any of this property? If yes, <u>submit BOE-267-O</u> if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.  7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If yes, see "Unrelated Business Taxable Income" on the reverse.  8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If yes, attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.  9. Is there any equipment or property at this location that is leased or rented to the claimant? If yes, provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.  NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)  I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.	Owned by a non-profit organization or eligible limited	l liability company, <u>submit BOE-267-L</u>					
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Living quarters associated with a rehabilitation program, submit BOE-267-R  Other - If you claim exemption for this portion, submit documentation including the occupant's position or role in the organization, with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)  6. Do other persons or organizations use any of this property? If yes, submit BOE-267-Q if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.  7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If yes, see "Unrelated Business Taxable Income" on the reverse.  8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If yes, attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.  9. Is there any equipment or property at this location that is leased or rented to the claimant? If yes, provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.  NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)  I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.  SIGNATURE OF CLAIMANT    DATTIME TELEPHONE   DATE   DATE	Housing for senior or handicapped, <u>submit BOE-267-H</u> unless care or services are provided or the property is financed by the federal						
with a statement indicating that housing continues to be used for the organization's exempt purpose. (See "Housing" on reverse.)  6. Do other persons or organizations use any of this property? If yes, submit BOE-267-0 if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.  7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If yes, see "Unrelated Business Taxable Income" on the reverse.  8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If yes, attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.  9. Is there any equipment or property at this location that is leased or rented to the claimant? If yes, provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.  NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)    Certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.    SIGNATURE OF CLAIMANT							
G. Do other persons or organizations use any of this property? If <b>yes</b> , <u>submit BOE-267-O</u> if real property is used; for personal property attach a list describing what is used, the name of the user, the amount received by claimant (if any) and a copy of the lease agreement if not previously provided to the Assessor.  7. Did this or any portion of this property generate taxable "unrelated business taxable income," as defined in section 512 of the Internal Revenue Code? If <b>yes</b> , see "Unrelated Business Taxable Income" on the reverse.  8. Have the organization's income and/or expenses increased by more than 25 percent since last year? If <b>yes</b> , attach a copy of your most recent and the prior year's complete financial statements along with an explanation of increase.  9. Is there any equipment or property at this location that is leased or rented to the claimant? If <b>yes</b> , provide the owner's name and address and a description of the property. This property may be taxable as it is not owned by the claimant.  NAME OF PERSON TO CONTACT FOR ADDITIONAL INFORMATION (please print)  I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information hereon, including any accompanying statements or documents, is true, correct and complete to the best of my knowledge and belief.  SIGNATURE OF CLAIMANT  TITLE  DATE  EMAIL ADDRESS	Other - If you claim exemption for this portion, submit do	cumentation including the occupant's position or role in the organization,					
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BOE-267-A (P2) REV. 23 (05-22)

#### **GENERAL INFORMATION**

The Welfare Exemption is available only to property, real or personal, **owned** by a religious, charitable, hospital, or scientific organization and **used exclusively** for religious, charitable, hospital, or scientific purposes. It is also available on a taxable possessory interest in publically owned real property used for exempt purposes by an organization that qualifies for the welfare exemption. A public owner is a local, state or federal agency.

To be eligible for the full exemption, the claimant **must** file a claim each year on or before February 15. Only 90 percent of any tax, penalty, or interest may be canceled or refunded when a claim is filed between February 16 and December 31 of the current year. If the application is filed on or after January 1 of the next year, only 85 percent of any tax, penalty, or interest may be canceled or refunded. The tax, penalty, and interest for a given year may not exceed \$250. A separate claim must be completed and filed for each property for which exemption is sought.

In accordance with Revenue and Taxation Code section 254.5(b)(2), the assessor may institute an audit or verification of the property's use to determine whether both the owner and user of the property meet the requirements of Revenue and Taxation Code section 214.

#### ORGANIZATIONAL CLEARANCE CERTIFICATE

The Assessor may not approve a property tax exemption claim until the claimant has been issued a valid *Organizational Clearance Certificate* (OCC) by the State Board of Equalization. If you are seeking exemption on this property, you must provide the organization's OCC No. and date issued. A listing of organizations with valid OCCs is available on the Board's website (www.boe.ca.gov) and can be accessed at www.boe.ca.gov/proptaxes/welfareorgeligible.htm. You may also contact the Board at 1-916-274-3430.

#### **HOUSING**

If question 5, box "Other" is checked, describe the portion of the property used for living quarters (since January 1 of the prior year). Submit (1) documentation, including tenets, canons, or written policy, that indicates the organization requires housing be provided to employees and/or volunteers, or (2) include statement why such housing is incidental to and reasonably necessary for the exempt purpose of the organization. If the documentation described in items (1) or (2) has been submitted in a previous year for this location, please submit documentation including the occupant's position or role in the organization with a statement indicating that the housing continues to be used for organization's exempt purpose.

#### **USE OF THE PROPERTY BY OTHER ORGANIZATIONS**

If question 6 is answered **yes**, and your organization's real property is used by another party submit BOE-267-O. If another party only uses your personal property, then submit an attachment providing the requested information for such personal property and confirm that no real property is used by other parties. The lease does not need to be provided if furnished in a prior year.

### **UNRELATED BUSINESS TAXABLE INCOME**

If question 7 is answered yes, you must attach the following to the claim:

- the organization's information and tax returns, including Form 990-T, filed with the Internal Revenue Service for its immediately preceding year;
- a statement setting forth the amount of time devoted to the organization's income-producing and to its non income-producing activities and, where applicable, a description of that portion of the property on which those activities are conducted;
- a statement listing the specific activities and locations which produce unrelated business taxable income; and
- a statement setting forth the amount of income of the organization that is attributable to activities in this state and is exempt from income or franchise taxation and the amount of total income of the organization that is attributable to activities in this state.

ASSESSOR'S USE ONLY								
ASSESSED VALUES								
ITEM	TOTAL ASSESSED VALUE OF:							
	LAND	IMPROVEMENTS	PERSONAL PROPERTY	FIXTURES	TOTAL			
ITEM	EXEMP							
	LAND	IMPROVEMENTS	PERSONAL PROPERTY	FIXTURES	TOTAL			
If another exemption, such as the church, religious, etc., was allowed this year on a portion of the property described in the claim, indicate the type and								
amount of the exemption:	\$	(amount)						
By								
		(Assessor or designee)			(date)			



EF-267-A-R23-0522-0600007