# WELFARE EXEMPTION SUPPLEMENTAL AFFIDAVIT, REHABILITATION — LIVING QUARTERS



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This claim is filed for fiscal year 20 \_\_\_\_\_ 20 \_\_\_\_

This is a Supplemental Affidavit filed with		
BOE-267, Claim for Welfare Exemption (First Filin	ng)	
BOE-267-A, Claim for Welfare Exemption (Annua		
Section 1. Identification of Applicant		
Name of Organization		
Mailing Address (number and street)		Corporate ID or LLC Number
City, State, Zip Code		I
Organizational Clearance Certificate (OCC) No an OCC, have you filed a claim for an OCC with the BOE?	(Provide copy of certif	ficate with this claim if first filing). If you do not have
🗌 Yes 🔲 No		
If No, see instructions for information on obtaining an OCC of	claim form.	
Section 2. Identification of Property		
Address of property (number and street)		Assessor's Parcel/Assessment Number(s)
City, County, Zip Code		Date Property Acquired
attachment.  A. Facility Information.  1. Number of hours per week the facility is operated:  Total number of	 f persons employed on the premises on Ja	nuary 1.
2. Persons being rehabilitated. Full-time:		
Identify the number of persons being rehabilitated base	ed on the length of employment:	
Less than 6 months: 6 months - 1 year:	1 year - 2 years:	
3. Staff and/or others. Full-time: Part-time	e:	(list by number of years)
B. Total number employed off the premises, but in th	ne operations of the facility as of Janu	ary 1.
1. Persons being rehabilitated. Full-time:		
Identify the number of persons being rehabilitated base		
Less than 6 months: 6 months - 1 year:	1 year - 2 years:	Longer than 2 years:
2. Staff and/or others. Full-time: Part-time	e:	(list by number of years)
C. Total number of hours worked during the time per 1. Persons being rehabilitated. Number of hours worked: Number	riod included in the financial statemen	its that accompany the claim.
2. Staff and/or others. Number of hours worked: Number	of persons involved:	
FOR ASSESSOR'S USE ONLY		contact during normal business additional information?
Received by(Assessor's designee)		
	NAME	
of on (date)	DAYTIME TELEPHONE	EMAIL ADDRESS

# THIS DOCUMENT IS SUBJECT TO PUBLIC INSPECTION

#### D. Salaries and wages paid during the time period included in the financial statements that accompany the claim.

- Persons being rehabilitated.
   Salaries and wages: \_\_\_\_\_\_ Number of persons involved: \_\_\_\_\_\_
  2. Staff and/or others.
  - Salaries and wages: \_\_\_\_\_ Number of persons involved: \_

#### E. Does a person, management firm, or entity other than the organization filing this claim operate the facility?

Yes No If YES, provide the operator's name and mailing address:

Amount of salary or fee: \$\_\_\_\_\_ Attach a copy of the contract or other document that indicates the basis for the salary or fee.

#### F. Is housing for persons being rehabilitated and/or living quarters for staff provided?

Yes No If YES, explain the necessity and complete section 4, *Housing - Living Quarters*.

#### Section 4. Housing — Living Quarters

#### A. Total number of persons who were housed on the premises the last night in December. Include persons who may be temporarily away.

1. Total number of persons being rehabilitated	1
2. Number of unoccupied beds available for persons to be rehabilitated	
3. Number of staff members necessary to care for those persons being rehabilitated. Attach a list describing the jobs performed and the number of persons involved.	
4. Number of other staff members	
5. Number of other persons who are not directly connected with the rehabilitation program	

#### B. Length of stay of persons being rehabilitated who were housed on the premises the last night in December.

1. Number of persons
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•	
less than 6 months	
6 months - 1 year	
1 year - 2 years	
2 years or longer (list by number of years)	
2. Total. This figure must agree with the total given above for persons being rehabilitated.	

#### C. Do persons being rehabilitated pay, donate, or perform fund producing work for their room and board?

Yes No If YES, indicate which and explain in sufficient detail to determine the monthly fee per person.

D.	Do staff members who care for those being rehabilitated pay, donate, or perform work for their room and/or board in lieu o	of, or
	from, their salary?	

Yes No If YES, indicate which and explain in sufficient detail to determine the monthly fee per person.

#### E. Do other staff members pay, donate, or perform work for their room and/or board in lieu of, or from, their salary?

Yes No If YES, indicate which and explain in sufficient detail to determine the monthly fee per person.

F. Do the oth	er persons	not directly	connected wit	h the rehabilitation	on program pa	y, donate,	or perform v	vork for their r	oom and/or
board?									

Yes No If YES, indicate which and explain in sufficient detail to determine the monthly fee per person.

#### CERTIFICATION

I certify (or declare) under penalty of perjury under the laws of the State of California that the foregoing and all information contained herein, including any accompanying statements or documents, is true, correct, and complete to the best of my knowledge and belief.

	V WE		DATE		
ī	NAME	TITLE	DATE		

SIGNATURE



### INSTRUCTIONS FOR FILING WELFARE EXEMPTION SUPPLEMENTAL AFFIDAVIT REHABILITATION – LIVING QUARTERS

# FILING OF AFFIDAVIT

This affidavit is required under the provisions of sections 251 and 254.5 of the Revenue and Taxation code and must be filed when seeking exemption on property that involves rehabilitation of persons and/or living quarters. A separate affidavit must be filed for each location. This affidavit supplements the claim for welfare exemption and must be filed with the county assessor by February 15 to avoid a late filing penalty under section 270. If you do not complete and file this form, you may be denied the exemption.

# FISCAL YEAR

The fiscal year for which an exemption is sought must be entered correctly. The proper fiscal year follows the lien date (12:01 a.m., January 1) as of which the taxable or exempt status of the property is determined. For example, a person filing a timely claim in February 2011 would enter "2011-2012" on line four of the claim; a "2010-2011" entry on a claim filed in February 2011 would signify that a late claim was being filed for the preceding fiscal year.

# **SECTION 1. Identification of Applicant.**

Identify the name of the organization seeking exemption on the property, corporate identification number (or limited liability number if the organization is a limited liability company), and mailing address.

# SECTION 2. Identification of Property.

Identify the location of the property, county in which the property is located, and the date the property was acquired by the organization. Also identify the assessor's parcel number or assessment number of the property.

# SECTION 3. Rehabilitation: Thrift shop, Workshop, Manufacturing, or Similar Activities.

Provide a copy of the organization's formal rehabilitation program or describe the rehabilitation program and activities in detail on a separate sheet of paper. As requested in this section of the claim form, provide information on persons being rehabilitated and staff (and/or others) at the store or other facility for which you are claiming exemption.

# SECTION 4. Housing – Living Quarters.

Complete this section of the claim form if the organization provides housing for the persons being rehabilitated and/or the organization provides living quarters for staff. As requested in this section, provide information on persons who are housed by the organization on the premises and if those persons housed pay, donate, or perform work for their room and/or board.

# OBTAINING CLAIM FORMS FROM THE STATE BOARD OF EQUALIZATION (BOE)

Claim form BOE-277, *Claim for Organizational Clearance Certificate – Welfare Exemption*, is available on the BOE's website (www.boe.ca.gov) or you may request the form by contacting the Welfare Exemption Section at 1-916-274-3430.

