EF-267-O-R00-1016-42000822-1 BOE-267-O (P1) (10-16)

This claim is filed for fiscal year 20 _

WELFARE EXEMPTION SUPPLEMENTAL AFFIDAVIT, ORGANIZATIONS AND PERSONS USING **CLAIMANT'S REAL PROPERTY**

— 20

County Clerk, Recorder and Assessor P.O. Box 159, Santa Barbara, CA 93102-0159

Joseph E. Holland

Santa Barbara (805) 568-2550 Santa Maria (805) 346-8310

Section 1. Identification of Claimant/Owner and Pr EGAL NAME OF ORGANIZATION	operty			CORROBATE OR LLC ID NO. (if any)	
EGAL NAME OF ORGANIZATION				CORPORATE OR LLC ID NO. (if any)	
DDRESS OF PROPERTY (number and street)	CIT	ΓΥ	ASSESSOF	R'S PARCEL/ASSESSMENT NUMBER	
Section 2. Organizations and Persons Using Owne	er's Real Proper	ty (Attach additional co	pies of this for	m, if necessary)	
otal Number of Users:	·	• `	•	•	
Part A					
NAME OF ORGANIZATIONS OR PERSON (including DB/	A name, if applicabl	e)			
D. PHONE NUMBER OR EMAIL ADDRESS			c. NEW USE	R THIS YEAR? Yes No	
		If yes, date use began:			
I. DESCRIPTION OF PROPERTY USED BY ORGANIZATION	N/PERSON LISTE	D IN (a) ABOVE (type of p	operty and porti	ons of property used, including square footage):	
CURRENT LEASE OR AGREEMENT ATTACHED?		f. IS EXEMPTION REQUE	STED ON THE F	PORTION OF PROPERTY USED BY THIS USER	
Yes No, submitted with a previous filing No written agreement Yes (complete Part B for this user) No (no further information req		No (no further information required for this use			
Part B	I				
. DESCRIPTION OF THE USER'S USE OF THE PROPERT	TY:				
b. FREQUENCY OF USE (daily, once per week, etc):			c. RENT OR FEES RECEIVED FROM USER (amount and frequency):		
b. FREQUENCY OF USE (daily, once per week, etc):		c. RENT OR FEES REC	EIVED FROM U	ISER (amount and frequency):	
	NOT OFFICIAL				
I. DOES THE USER HAVE AN ORGANIZATIONAL CLEARA		E (OCC)? e. Pl	JRPOSE(S) OR	GANIZED FOR:	
d. DOES THE USER HAVE AN ORGANIZATIONAL CLEARA	nents may be requir	E (OCC)? e. Pl	JRPOSE(S) OR(Charitable ☐ Re	GANIZED FOR:	
D. FREQUENCY OF USE (daily, once per week, etc): d. DOES THE USER HAVE AN ORGANIZATIONAL CLEARA Yes, OCC NO No (additional document of the complex	nents may be requirecopy of tax exempts	E (OCC)? e. Productions e. Productions et al. (OCC)?	JRPOSE(S) OR€ Charitable ☐ Re d with a previous	GANIZED FOR: ligious Hospital Scientific Other s filing)	
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THIS DOCUMENT IS SUBJECT TO PUBLIC INSPECTION

TITLE

DATE

CERTIFICATION 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 PERSON MAKING CLAIM

NAME OF PERSON MAKING CLAIM

INSTRUCTIONS FOR FILING WELFARE EXEMPTION SUPPLEMENTAL AFFIDAVIT ORGANIZATIONS AND PERSONS USING CLAIMANT'S REAL PROPERTY

FILING OF AFFIDAVIT

This affidavit must be filed by the owner of real property when another organization or person uses that real property. A separate affidavit must be filed for each location. This affidavit supplements the claim for welfare exemption, which must be filed with the county assessor by February 15 to avoid a late filing penalty under Revenue and Taxation Code section 270. The information provided on this affidavit is used by the assessor to determine how the property is being used and by whom. If this form is not completed, the claimant/owner may be denied the exemption.

The welfare exemption requires that property be used exclusively for religious, charitable, hospital, or scientific purposes by qualifying organizations; however, it does not require that the owner be the only user of the property. Therefore, an owner may allow other organizations to use its property and still qualify for exemption, if the welfare exemption requirements are met. In order for property owned by one organization and used by another to be eligible for the welfare exemption, the owner and user of the property must be organized for exempt purposes and the property must be used for exempt purposes.

Organizations using the real property more than once a week must be exempt from federal income tax under the provisions of section 501(c)(3) of the Internal Revenue Code or exempt from state franchise or income tax under the provisions of section 23701d of the Revenue and Taxation Code. Organizations using the property once a week or less may also be exempt under 501(c)(4) of the Internal Revenue Code or 23701f or 23701w of the Revenue and Taxation Code.

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.

SECTION 1. Identification of Claimant/Owner and Property.

Identify the name of the organization that owns the real property (the claimant), and the address and Assessor's Parcel/Assessment Number of the property on which the exemption is being sought. Provide the organization's corporate identification number, if it is a nonprofit corporation, or number assigned by the Secretary of State, if it is a limited liability company.

SECTION 2. Organizations and Persons Using Owner's Real Property.

State the total number of organizations and/or persons, other than the claimant, that use the claimant's property.

Part A – Must be completed for all users of the claimant's real property.

- a. Provide the name of the organization or person using the property, including the DBA name, if applicable.
- b. Provide a contact phone number or email address for the user.
- c. Check the appropriate box to indicate if the user is new this year. If yes, state the date the property was first used by the user.
- d. Provide a description of the property used by the user, including room number(s), suite number(s), and square footage used.
- e. Check the appropriate box to indicate if the current lease or agreement is attached. Attach a copy of the current lease or agreement, if not submitted with a previous filing.
- f. Check the appropriate box to indicate if requesting exemption on the portion of the property used by the user. If yes, complete Part B for the user. If no, no further information is required for the user.

Part B – Complete if seeking exemption on the portion of the property used by the user.

- a. Describe how the user uses the property, including all primary and incidental uses.
- b. Indicate how often the user uses the property, for example, "daily," "twice per week," etc.
- c. State the rent or fees received from the user, including the amount and frequency.
- d. Check the appropriate box to indicate if the user holds an OCC. If yes, provide the OCC number. Note: A user of the property is not required to hold an OCC. If the user does not hold an OCC, the assessor may request additional information.
- e. Check the appropriate box(es) to indicate the purpose for which the organization is organized. If "Other" is checked, specify the purpose.
- f. Check the appropriate box(es) to indicate the tax exempt status of the user. If you are filing this affidavit with the Claim for Welfare Exemption (First Filing) (BOE-267), submit a copy of the user's tax exempt status letter. If you are filing this affidavit with your annual filing (BOE-267-A), and the property is operated by any organization(s) you have not previously reported to the assessor, submit a copy of the tax exempt status letter for each new user.

