

New South Wales

Application Form and Lodgement Guide

Note:

- Please read the Terms used for explanations in completing the application.
- Before lodging the application, remove pages 1 to 8 and keep for your reference.
- This form applies to applications where the commencement date of the eligible transaction is on or after 1 January 2010.

Lodgement guide

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 Owner Grant Act 2000*.

Applicants must:

- ✓ fully complete the application form and lodge with all relevant supporting documentation
- ✓ be a natural person (ie not applying as a company or trust), at least 18 years of age and whose interest in the property is not held subject to a trust
- ✓ ensure at least one applicant is an Australian citizen or a permanent resident
- ✓ be buying or building a home for which the contract was signed on or after 1 July 2000 or building a home as an owner builder where building commenced on or after 1 July 2000
- ✓ be buying or building a home for which the total value of the property does not exceed \$750 000 for eligible transactions which commenced on or after 1 January 2010
- ✓ ensure each person holding a relevant interest in the property is an applicant
- ✓ ensure at least one applicant 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. Where an applicant was a member of the permanent forces of the Australian Defence Force and **all** applicants were enrolled on the NSW electoral roll, as at the commencement date of the eligible transaction, dated on or after 21 October 2009, then all applicants are exempt from the residence requirement
- ✓ lodge an application within 12 months of completion of the eligible transaction.

Applicants and their spouse/partner must:

- ✓ not have previously received a First Home Owner Grant in any State or Territory of Australia. If a grant was received but later paid back together with any penalty, you may be entitled to reapply for the grant
- ✓ not have previously owned or held a relevant interest in a residential property anywhere in Australia prior to 1 July 2000
- ✓ not have occupied for a continuous period of at least six months, a residential property in which they acquired a relevant interest on or after 1 July 2000 anywhere in Australia.

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.osr.nsw.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**.
- Office of State Revenue (OSR). Applications cannot be lodged with OSR until after completion of the eligible transaction.

See Terms used for meaning of 'completion of the eligible transaction'.

Supporting evidence

If lodging with an approved agent, each applicant and their spouse/partner must provide a certified copy of a category 1 document (see below). The documents provided for the identity check conducted by the approved agent will meet the remaining proof of identity categories.

If lodging with OSR, the following evidence must be submitted with your application:

1 Proof of identity:

Each applicant and their spouse/partner must provide a document from each of the four categories (**four documents per person**). A single document cannot be used for more than one category.

Preferred documents are shown below. For a complete list of acceptable documents, refer to the Proof of Identity Documents information sheet available from our forms page at www.osr.nsw.gov.au

If you are unable to provide the preferred documents, please contact OSR to discuss your circumstances.

Do not send original documents. Only send **certified copies** (refer to 'Terms used' on page 6).

Note: Details of the proof of identity information submitted in the application and contained on the certified copies of the preferred documents attached will be verified with the authorities which issued the original documents.

Category 1

Primary identity document and evidence of citizenship or permanent residency (provide one document):

If an Australian citizen:

- Australian birth certificate issued by Registry of Births, Deaths & Marriages (extracts are not acceptable) OR
- citizenship certificate

If a New Zealand citizen:

- current passport.

Note: New Zealand citizens must be living in Australia at the commencement date of the eligible transaction.

If a citizen of another country:

- current passport and
- current valid visa and
- evidence of permanent residency or Australian citizenship for at least one applicant.

Note: At least one applicant must be an Australian citizen or permanent resident at the commencement date of the eligible transaction.

Note: Categories 2, 3 and 4 are not required if application is lodged with an approved agent.

Category 2

Linkage between identity and person (photo and signature) (provide one document):

- Australian Drivers Licence (current)
- passport (current)
- firearms licence (current)
- NSW photo card issued by the Roads and Traffic Authority.

Category 3

Evidence that the person operates in the community (provide one document):

- Medicare card
- motor vehicle registration
- Centrelink or Department of Veterans Affairs card
- debit/credit card of a financial institution.

Category 4

Evidence of the person's residential address (provide one document):

- utility documents of residential address (eg bills for electricity, gas, water etc)
- insurance policy with current residential address
- statement of account of a financial institution.

Supporting evidence (cont.)

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

If you are:

- married, a certified copy of your marriage certificate, issued by the Registry of Births, Deaths and Marriages
- divorced, a certified copy of your divorce certificate/decree nisi
- widowed, a certified copy of the death certificate of your spouse/partner, issued by the Registry of Births, Deaths and Marriages
- separated, a statutory declaration with the following information:
 - ▶ the name of your former spouse/partner
 - ▶ spouse/partner's date of birth
 - ▶ the date you were married or commenced your de-facto relationship
 - ▶ the date you separated
 - ▶ your former spouse/partner's current address (if known)
 - ▶ a statement to the effect that you do not live together and have no intention of resuming cohabitation.

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 (eg marriage certificate, change of name certificate, statutory declaration).

Defence Force residence exemption

An applicant seeking exemption from the residence requirement must provide a certified copy of a document issued by the Australian Defence Force which shows they are a member of the permanent forces of the Australian Defence Force as at the commencement date of the eligible transaction.

2 Transaction type

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

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

- a certified copy of the contract for the sale of land **dated and signed** by the vendor
- a title search showing the applicant(s) as the registered proprietor(s)*.

(i) Purchase from a related party

Where there is no written contract or the transaction is a related or associated party purchase, the following evidence is required:

- a certified copy of the transfer dated and signed by all parties
- a title search showing the applicant(s) as the registered proprietor(s)*, and
- evidence that the consideration has been paid by the applicant*, eg provide certified 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.
- evidence of total value of the property (house and land) dated within the last 12 months – attach one of the following:
 - ▶ a certified copy of the stamped contract or transfer which shows the dutiable amount in the stamping details
 - ▶ a certified copy of the property valuation by a registered valuer
 - ▶ a certified copy of the property valuation obtained by your financial institution for the approval of your loan
 - ▶ a certified copy of a market appraisal by a registered real estate agent.

* Not required if the application is lodged with an approved agent.

A Contract to purchase a new or established home or an 'off the plan' home: (cont.)

(ii) Purchase from a deceased estate

Where you are a beneficiary under the Will of the deceased person, the application must be lodged with OSR and the following evidence is required:

- a certified copy of the contract entered into with the executor
- a certified copy of the Will and Grant of Probate
- a certified copy of the settlement statement for the estate
- evidence of payment of consideration to the estate.
- evidence of total value of the property (house and land) dated within the last 12 months – attach one of the following:
 - ▶ a certified copy of the stamped contract or transfer which shows the dutiable amount in the stamping details
 - ▶ a certified copy of the property valuation by a registered valuer
 - ▶ a certified copy of the property valuation obtained by your financial institution for the approval of your loan
 - ▶ a certified copy of a market appraisal by a registered real estate agent.

B Contract to build a home:

- a certified copy of the contract to build dated and signed by all parties, and
- a certified copy of the occupation certificate or a Final Inspection Certificate*
- title search showing the applicant(s) as the registered proprietor(s)* (certified copy not required).
- evidence of unencumbered value (land only) dated within the last 12 months - attach one of the following:
 - ▶ a certified copy of the current council rate notice which shows the land value of the property
 - ▶ a certified copy of the 'Notice of Valuation' issued by the Valuer General's Department
 - ▶ a certified copy of the stamped contract or transfer for the purchase of the land.

* Not required if the application is lodged with an approved agent.

C Owner builder:

- a certified copy of the approval from council for the laying of the foundations or receipt for foundations
- a certified copy of the occupation certificate or a Final Inspection Certificate
- a certified copy of the documentary evidence of building costs incurred for the construction of the home. The proof submitted must total an amount equal to or greater than the grant and must not include your own labour costs
- title search showing the applicant(s) as the registered proprietor(s) (certified copy not required).
- evidence of total value of the property (house and land) as at completion of the home – attach one of the following:
 - ▶ a certified copy of the property valuation by a registered valuer
 - ▶ a certified copy of the property valuation obtained by your financial institution for the approval of your loan
 - ▶ a certified copy of a market appraisal by a registered real estate agent.

When will the grant be paid?

The date the grant is paid depends on whether you are building or buying, and if you are applying through an approved agent or through OSR.

The following table details the various scenarios.

| Type of transaction | Applying through | Payment of grant |
|---------------------------------------|-------------------------|--|
| Purchase of a new or established home | Approved agent | At date of settlement by approved agent. |
| | OSR | Within 14 days of lodging a complete application, a payment made to your nominated bank account by OSR. |
| Contract to build | Approved agent | On date of first progress payment by approved agent. |
| | OSR | Within 14 days of lodging application with evidence of completion, a payment made to your nominated bank account by OSR. |
| Owner builder | Must be lodged with OSR | Within 14 days of lodging application with evidence of completion, a payment made to your nominated bank account by OSR. |
| Terms contract | Must be lodged with OSR | Within 14 days of lodging application with evidence of possession and that an applicant has taken up occupation of the home, a payment made to your nominated bank account by OSR. |

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

- At least one applicant 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. Where an applicant was a member of the permanent forces of the Australian Defence Force and **all** applicants were enrolled on the NSW electoral roll, as at the commencement date of the eligible transaction, dated on or after 21 October 2009, then all applicants are exempt from the residence requirement.
- It is the responsibility of the applicant to satisfy the Commissioner that they have met the residence requirement. Applicants may be required to verify this later by providing documentation supporting their period of occupancy.
- Should you not meet the residence requirement, you must contact OSR within 14 days after the period allowed for occupation, notifying OSR in writing and repay the grant.

Contact details

Phone: 1300 130 624* (8.30 am – 5.00 pm, Monday to Friday)

Website: www.osr.nsw.gov.au

Email: first.home.benefits@osr.nsw.gov.au

*Interstate clients call (02) 9689 6200
Help in community languages is available.

OFFICE Open 8.30 am – 4.30 pm, Monday to Friday (excluding public holidays)

Parramatta

Head office location: Lang Centre, corner Hunter and Marsden Streets, Parramatta (not a postal address)
Postal: GPO Box 4087, Sydney NSW 2001

Newcastle

Office: Level 2, 97 Scott Street
Postal: PO Box 511, Newcastle NSW 2300

Wollongong

Office: Level 6, 90 Crown Street
Postal: PO Box 666, Wollongong NSW 2520

Terms used

Applicant

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

Approved agent

An organisation approved by OSR that is authorised to process applications for the First Home Owner Grant.

Certified copy

A true copy of an original document that has been sighted and certified by an acceptable 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 full name, title, registration number (where applicable) and be signed and dated.

*An acceptable person who may certify documents for the purpose of the FHOG are: legal practitioner, justice of the peace (JP), magistrate, notary public, police officer, dentist, veterinary practitioner, pharmacist, certified practising accountant, chartered accountant, licenced conveyancer, Commissioner for Declarations, member of parliament, minister of religion, medical practitioner, officers of OSR, officers of approved agents (Mortgage brokers are not considered an officer of an approved agent).

Commencement date of the eligible transaction

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

Commissioner

Chief Commissioner of State Revenue, New South Wales.

Completion of the eligible transaction

When the applicant is entitled to possession of the property under the contract, or the eligible building is ready for occupation as a place of residence and (except for Terms contracts) the applicant is registered on the certificate of title.

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

The purchase price or cost of construction of the home.

Eligible transaction

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

Established home

A home that has been previously occupied and is lawfully fit for occupation.

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.

Natural person

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

New home

A home that has not previously been lived in or sold as a place of residence including off the plan and house and land packages.

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 satisfy the residence requirement or where the total value exceeds \$750 000.

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.

OSR

The Office of State Revenue, New South Wales.

Permanent forces of the Australian Defence Force

Permanent forces of the Australian Defence Force comprises of members of the Regular Army, the Permanent Navy or the Permanent Air Force. It does not include a reservist for the Army, Navy or Air Force.

Permanent resident

A person who holds a permanent residency visa (under Section 30 of the *Migration Act 1958 of the Commonwealth*) or a New Zealand citizen who is the holder of a special category visa (under Section 32 of the *Migration Act 1958*).

Principal place of residence

The home you primarily reside in.

Property

Under the *First Home Owner Grant Act 2000* property means:

- a) a home OR
- b) land OR
- c) a relevant interest in land.

Terms used (cont.)

Related or associated party

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

- a) one is the spouse/partner of the other, or
- b) they are related by blood, marriage or adoption, or
- c) they are a shareholder or director of the other party, being a company, or
- d) they are a beneficiary of a trust for which the other party is a trustee, or
- e) 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 Owner Grant Act 2000*.

Residence requirement

At least one applicant must 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.

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, fixed moveable homes and kit homes.

Small interest holder

A person whose ownership share in the home does not exceed 5 per cent. Where there is more than one small interest holder, the total ownership share of all small interest holders does not exceed 5 per cent.

Spouse/partner

The person to whom the applicant is married or living with as a couple in a de facto relationship (including same sex relationships) as defined in the *Property (Relationships) Act 1984*. **Note:** There is no minimum period of cohabitation needed to establish a de facto relationship under the *Property (Relationships) Act 1984*.

Terms contract

A contract for the sale of land where the purchaser has to make two or more payments (excluding the deposit) to the vendor after the contract is signed by all parties.

The applicant, as the purchaser, must be in possession under the contract and cannot be registered on title until the final payment is made to the vendor.

Title search

A search on the land which shows the names of the registered owners. A title search can be obtained from the NSW Land and Property Management Authority website: www.lands.nsw.gov.au

Total value

Contract to purchase a home, the total value is the greater of the following:

1. The consideration for the eligible transaction,
2. The unencumbered value, as at the **commencement** date of the eligible transaction

Contract to build, the total value is calculated by adding together:

1. The consideration for the eligible transaction, and
2. The value, at the **commencement** date of the relevant interest in the land on which the home is to be built

Owner builder, the total value is calculated by adding together:

1. The unencumbered value of the home at the date the transaction is **completed**, and
2. The value, at the date the transaction is **completed**, of the relevant interest in the land on which the home is built.

Unencumbered Value

The total value of the property determined without regard to any encumbrance (eg mortgage) to which the property is subject, or any arrangement that results in the reduction of the value of the property (eg child purchasing home from parents at a reduced price). Please refer to the *First Home Owner Grant Act 2000* for the full definition of unencumbered value.

Guide to completing the application

The first home owner grant application form has eight sections.

These sections must be completed as follows:

Section 1 Eligibility criteria

Answer questions 1 to 7 by crossing 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/partner of these persons, must be considered when answering these questions.

In exceptional circumstances, the Commissioner may use discretion in relation to the eligibility criteria. Please contact OSR for further information.

All decisions relating to the eligibility of an applicant are made by the Commissioner and are determined on the facts and circumstances as at the commencement date of the eligible transaction.

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/partner, there are two options. If your spouse/partner is an applicant, they must be recorded within this section. If your spouse/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/partner details

This section must be completed where the spouse/partner of an applicant has not been specified in Section 2 as an applicant (and therefore will have no relevant interest in the residential property). If this section is required to be completed the spouse/partner must complete the declaration in Section 7.

Section 4 Property and transaction details

Provide the address and current title (folio identifier number) details of the property. The folio identifier number can be obtained from the transfer document, a title search or the contract for sale. If the folio identifier number is unavailable, enter the parent title folio identifier number.

Provide the expected date of occupancy as owner of the home. Estimate this date if you are unsure or leave blank if the Australian Defence Force residence exemption applies.

Provide the unencumbered value of the property if you are acquiring the home from a related party or you have entered into a contract to build or are an owner builder.

Section 5 Payment details

Applicants must complete this section only if applying through OSR.

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 the 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, leave payment details blank.

Section 6 Declaration by applicant

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

Section 7 Declaration by spouse/partner

If an applicant's spouse/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 check off the documents attached. Failure to produce the relevant documentation will result in delays in processing.

Penalties

OSR, as part of its role in administering the *First Home Owner Grant Act 2000*, conducts 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 residence requirement, penalties of up to 100 per cent may be imposed.

Providing false or misleading information in this application

Providing false or misleading information to OSR is a criminal offence. If it is determined that an applicant has provided false or misleading information to obtain, or attempt to obtain the grant, then prosecution action may be commenced.

PRIVACY STATEMENT

The information in this form is required by the Office of State Revenue (OSR) to determine your eligibility for the grant under the First Home Owner Grant scheme. By submitting this form, you consent to OSR using the information to process your application. The information will be stored on the First Home Owner Grant national database, and your application will be retained by either OSR or your approved agent. Information will only be used and disclosed as required or permitted by law, or with your consent.

An individual may review and update personal information held by OSR by contacting the office.



New South Wales

Application Form

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 cross 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 commencement date of the eligible transaction
- All applicants and their spouse/partner must be considered when answering eligibility questions.

Eligibility checklist

| | |
|---|--|
| 1. Is this the first time each applicant and/or their spouse/partner will receive a grant under the <i>First Home Owner Grant Act 2000</i> in any state or territory of Australia? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 2. Is each applicant and their spouse/partner a person who has never owned a residential property, either jointly, separately or with some other person before 1 July 2000 in any state or territory of Australia? Note: Applicants are not eligible for a grant if they or their spouse/partner have held a relevant interest in residential property prior to 1 July 2000, even if they have never occupied the property. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 3. Is each applicant and their spouse/partner a person who has never occupied a residential property for a continuous period of at least six months in which they acquired a relevant interest on or after 1 July 2000 in any state or territory of Australia? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 4. Is each applicant a natural person (ie not a company or trust) at least 18 years of age and whose interest in the property is not held subject to a trust? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 5. Is at least one applicant a permanent resident or Australian citizen? | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 6. Will at least one applicant be occupying 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? Note: To apply for the Australian Defence Force residence exemption, please complete the Australian Defence Force residence exemption questions in Section 2. | <input type="checkbox"/> Yes <input type="checkbox"/> No |
| 7. Has each applicant on or after 1 July 2000 in respect of the home to which this application relates, either: <ul style="list-style-type: none"> ▪ entered into a contract for the purchase of the home in New South Wales OR ▪ entered into a contract to have the home built in New South Wales OR ▪ in the case of an owner builder, commenced construction of the home in New South Wales? (ie laying of foundations). | <input type="checkbox"/> Yes <input type="checkbox"/> No |

Determination of eligibility

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

Please attach additional information (where applicable) to support your eligibility for the First Home Owner Grant.

SECTION 2 Applicant details

Note:

- 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?

Enter number of applicants

Related or associated party transactions

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

Yes



If yes, please provide evidence of the consideration paid. (Refer to lodgement guide).

No

Indigenous Australian

This question is optional – the information will only be used for statistical purposes by Commonwealth and State Governments, and has no bearing on your application.

Are any of the applicants Aboriginal or Torres Strait Islander?

Yes

No

Australian Defence Force residence exemption

An exemption to the residence requirement, is only available to Australian Defence Force personnel.

Please leave questions blank if you are not entitled to the exemption.

Only complete the following questions if you are applying for the exemption.

1. Was at least one applicant a member of the permanent forces of the Australian Defence Force as at the commencement date of the eligible transaction?

Yes

No

If 'Yes', please indicate which branch they serve(d) in:

Regular Army

Permanent Navy

Permanent Air Force

2. If 'Yes' to question 1 were **all** the applicants enrolled on the NSW electoral roll as at the commencement date of the eligible transaction?

Yes

No

If you answered 'Yes' to questions 1 and 2 and the commencement date of the eligible transaction was on or after 21 October 2009, you may be eligible for the residence exemption.

To receive your exemption, please provide a certified copy of a document issued by the Australian Defence Force. This document must clearly show that the applicant was a permanent member of the Australian Defence Force as at the commencement date of the eligible transaction.

Note: An exemption will not be granted if the document is not provided.

Approved Agent and OSR use only

Please cross this box if you have sighted the documentary evidence and a certified copy is attached to the application.

Yes

(Evidence provided)

Participation in First Home Benefits promotions

This question is optional – and has no bearing on your application.

The Office of State Revenue often promotes the First Home Benefits to increase awareness.

Please cross this box if you would like to assist in any future promotional activity. You will be contacted by OSR prior to any promotional activity.

Yes

I would like to assist in promotional activity

SECTION 2 Applicant details (cont)

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 <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 (dd/mm/yyyy) | <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"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> |
| Place of birth | State/Territory <input type="text"/> | State/Territory <input type="text"/> |
| | Country <input type="text"/> | Country <input type="text"/> |
| Daytime phone 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. <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"/> Postcode <input type="text"/> | State <input type="text"/> Postcode <input type="text"/> |
| Address for service of notices (if different from above) | Street no. <input type="text"/> | |
| | Street name <input type="text"/> | |
| | Suburb/town <input type="text"/> | |
| | State <input type="text"/> Postcode <input type="text"/> | |
| Do you have a spouse/partner? | <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 spouse/partner must complete the details as applicant 2 above. If 'No', you must complete Section 3 – spouse/partner details. | <input type="checkbox"/> Yes <input type="checkbox"/> No If 'Yes', your spouse/partner must complete the details as an applicant. If 'No', you must complete Section 3 – spouse/partner details. |

SECTION 3 Spouse/partner details

Note:

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

| | Spouse/partner of applicant 1 | Spouse/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 | | |
| Middle name(s) | | |
| Family name | | |
| Name on birth certificate (if different from above) | First name | First name |
| | Middle name(s) | Middle name(s) |
| | Family name | Family name |
| Has your spouse/partner 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 |
| | | |
| Date of birth (dd/mm/yyyy) | <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"/> |
| Place of birth | State/Territory | State/Territory |
| | Country | Country |
| Daytime phone number | () | () |

SECTION 4 Property and transaction details

Address of the property

Lot no. (only use lot no. if street no. is not allocated)
 Unit/
Street no.
 Street name

Suburb/town
 State
 Postcode

Date when occupation as a principal place of residence commenced or
 is intended to commence (if not known please estimate) (dd/mm/20yy)

Leave blank if Australian Defence Force residence exemption applies.

Title details

Lot no.
 Section no.
 Plan type*
 Plan no.

* Enter DP for Deposited Plan; SP for Strata Plan; Other if not DP or SP and enter the other details under Plan no.

Transaction details

What type of transaction does this application refer to? Please cross one:

Established home
 Off the plan
 Contract to build
 New home
 Owner builder

Purchase or construction price

\$

Required for all transaction types:

- Contract to purchase – Enter consideration shown on contract
- Contract to build – Enter consideration shown on contract
- Owner builder – Enter cost of construction. Do not include own labour costs.

SECTION 4 Property and transaction details (cont.)

Required when you are building your home under a Contract to Build.

Unencumbered value (land only)

- Enter the unimproved land value,
- Tick the appropriate box below for the type of evidence used. Evidence must be dated within the last 12 months, and
- Attach a certified copy of the evidence.

- A certified copy of the council rate notice which shows the land value of the property OR
- A certified copy of the 'Notice of Valuation' issued by the Valuer General's Department OR
- A certified copy of the stamped contract or transfer for the purchase of the land.

Required for Related Party transactions or Owner Builders.

Unencumbered value (house and land)

Evidence of the property's total value dated within the last 12 months is required if you are purchasing your home from a related or associated party or you built your home as an Owner Builder.

- Enter the total value of the house and land,
 - Tick the appropriate box below for the type of evidence used, and
 - Attach a certified copy of the evidence.
- Stamped agreement of sale or transfer when the property was purchased which shows the dutiable amount within the stamping details (Related Party transactions only) OR
- Property Valuation by a registered valuer OR
- Financial institution's property valuation obtained for loan approval OR
- Market appraisal by a registered real estate agent.

APPROVED AGENT AND OSR USE ONLY

All evidence sighted Name of person sighting the evidence

Payment eligibility date (Enter settlement, completion or first draw down date only) (dd/mm/20yy)

Note: For contracts to purchase only enter the settlement date specified in the exchanged contract or the actual date booked for settlement.

Date of contract (or if owner builder, date the foundations were laid) (dd/mm/20yy)

Date of settlement (or if building, date of completion) (dd/mm/20yy)

Note: If lodging with an approved agent, please estimate

SECTION 5 Payment details

Note:

- If applying with OSR, 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 in accordance with your agreement.

Payment Reference (optional): This reference will be shown on the account statement, to assist in identifying the payment.

Name of financial institution and branch

Account name (eg John & Jane Citizen)

BSB number (must have 6 numbers)

Account number (maximum of 9 numbers)

* DO NOT include dashes or spaces

IMPORTANT – Please confirm the account details provided above are correct before lodging your application with OSR.

SECTION 6 Declaration by applicant(s)

1. I have completed the application form and attached all relevant documents in support of this application.
2. I declare that I have not previously received and retained the grant under the *First Home Owner Grant Act 2000*, or a corresponding Act in another State or Territory, either alone or together with any other person or persons.
3. I declare that I have not owned a home or had a relevant interest in a residential property within Australia prior to 1 July 2000.
4. I declare that I have not owned and occupied, for a continuous period of at least six months, a residential property within Australia in which I acquired a relevant interest on or after 1 July 2000.
5. I declare that the interest I hold in the property is not held subject to a trust.
6. I declare that at the commencement date of the eligible transaction at least one applicant for the grant was a permanent resident or an Australian citizen.
7. I declare that at least one applicant will be residing in the home that is the subject of this application 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, or the residence requirement does not apply as an applicant was as at the commencement date of the eligible transaction a member of the permanent forces of the Australian Defence Force and all applicants were enrolled on the NSW electoral roll.
8. I undertake to notify the Commissioner of any notifiable event in writing relevant to the requirements under the *First Home Owner Grant Act 2000* within 14 days from the occurrence of that notifiable event.
9. I have read and understood the information prepared by OSR 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 grant.
10. I authorise OSR to collect, access and exchange information about me to verify my proof of identity information and to determine my eligibility for the First Home Owners Grant with the approved agent (where applicable), document issuing authorities, other State, Territory and Australian Government agencies and commercial organisations as permitted by law.
11. I understand that the approved agent is not authorised by OSR to offer any advice or assistance on the conditions of eligibility for the grant, or on the completion of this application.
12. I authorise the approved agent to hold the grant until completion of the eligible transaction and to repay the grant to the Commissioner if the transaction is not completed within 28 days of the date specified.
13. I declare that I will repay the grant within 14 days of becoming aware that the total value of the property exceeds \$750 000 as at commencement date of the eligible transaction for Contracts to Purchase and Contracts to Build or as at the completion date of the eligible transaction for a home built by an Owner Builder.
14. I authorise the Commissioner to address all correspondence relating to this application to Applicant 1 at the address nominated.
15. I acknowledge that I may be required to repay the grant, be liable for penalties and may also be prosecuted for making a false or misleading statement in or in connection with this application for the grant.
16. **I authorise OSR to deposit the grant into the account nominated in Section 5 (ensure account details are correct) or into the approved agent's nominated account when lodged with the approved agent.**

I declare that I have read and understood the above information and that the information provided in this application is true and correct.

| | Applicant 1 | Applicant 2 |
|--------------------------------------|---|---|
| Name | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> |
| Signature | <input style="width: 100%;" type="text"/> | <input style="width: 100%;" type="text"/> |
| Date (dd/mm/20yy) | <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px; text-align: center; border: 1px solid black;" type="text" value="2"/> <input style="width: 25px; height: 25px; text-align: center; border: 1px solid black;" type="text" value="0"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> | <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px; text-align: center; border: 1px solid black;" type="text" value="2"/> <input style="width: 25px; height: 25px; text-align: center; border: 1px solid black;" type="text" value="0"/> <input style="width: 25px; height: 25px;" type="text"/> <input style="width: 25px; height: 25px;" type="text"/> |
| Before me (signature of witness)* | <input style="width: 100%;" type="text" value="Signature"/> | <input style="width: 100%;" type="text" value="Signature"/> |
| Full name and address of witness | <input style="width: 100%;" type="text" value="Name"/> | <input style="width: 100%;" type="text" value="Name"/> |
| | <input style="width: 100%;" type="text" value="Street no."/> | <input style="width: 100%;" type="text" value="Street no."/> |
| | <input style="width: 100%;" type="text" value="Street name"/> | <input style="width: 100%;" type="text" value="Street name"/> |
| | <input style="width: 100%;" type="text" value="Suburb/town"/> | <input style="width: 100%;" type="text" value="Suburb/town"/> |
| | <input style="width: 50%; height: 25px;" type="text" value="State"/> <input style="width: 50%; height: 25px;" type="text" value="Postcode"/> | <input style="width: 50%; height: 25px;" type="text" value="State"/> <input style="width: 50%; height: 25px;" type="text" value="Postcode"/> |

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

IMPORTANT – If you are lodging your application directly with OSR, please check that the account details provided in Section 5 are correct before you sign your declaration.

SECTION 7 Declaration by spouse/partner(s)

- I declare that the spouse/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 grant under the *First Home Owner Grant Act 2000* or a corresponding Act in another State or Territory, either alone or together with any other person or persons.
- I declare that I have not owned a home or had a relevant interest in a residential property within Australia prior to 1 July 2000.
- I declare that I have not owned and occupied for a continuous period of six months a residential property within Australia in which I acquired a relevant interest on or after 1 July 2000.
- I authorise OSR to collect, access and exchange information about me to verify my proof of identity information and to confirm other details with the approved agent (where applicable), document issuing authorities, other State, Territory and Australian Government agencies and commercial organisations as permitted by law. I recognise that these checks may affect the applicant's eligibility for the First Home Owners Grant.
- I acknowledge that I may be prosecuted and fined for making a false or misleading statement on or in connection with this application for the grant.

Spouse/partner of Applicant 1

Name

Signature

Date (dd/mm/20yy)

Before me (signature of witness)*
Signature

Full name and address of witness
Name
Street no.
Street name
Suburb/town
State Postcode

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

Spouse/partner of Applicant 2

Signature

Name
Street no.
Street name
Suburb/town
State Postcode

Providing false or misleading information in this application

Providing false or misleading information to OSR is a criminal offence. If it is determined that an applicant has provided false or misleading information to obtain, or attempt to obtain the grant, then prosecution action may be commenced.

Penalties

OSR, as part of its role in administering the *First Home Owner Grant Act 2000*, conducts 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 residence requirement, penalties of up to 100 per cent may be imposed.

Lodgement of your application

- Lodge with the approved agent who is providing your finance.**
If you need the grant for settlement or first draw down/progress payment, you must lodge your application with an approved agent.
- Lodge with the Office of State Revenue (OSR)**
Payment will not be made until after settlement or if building after the home is completed.
Note: Applications cannot be lodged with OSR until after the completion of the eligible transaction.

If lodging with OSR, please post to:

| | | |
|--|--|--|
| Parramatta Office of State Revenue GPO Box 4087 Sydney NSW 2001 | Newcastle Office of State Revenue PO Box 511 Newcastle NSW 2300 | Wollongong Office of State Revenue PO Box 666 Wollongong NSW 2520 |
|--|--|--|

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. Do **not** send original documents, **only send certified copies.**

Applicant to cross if attached

Approved agent or OSR use only
Cross when sighted

Proof of identity of all applicants and their spouse/partner

Category 1 Type of document submitted _____ / _____

Category 2* Type of document submitted _____ / _____

Category 3* Type of document submitted _____ / _____

Category 4* Type of document submitted _____ / _____

- a Decree Nisi, a marriage or death certificate or change of name certificate
- a statutory declaration for those who are separated

Australian Defence Force residence exemption

Document confirming membership of the permanent forces

Transaction type

Contract to purchase a home

- a certified copy of your Contract for Sale, dated and signed by the vendor.
- a title search showing the applicant(s) as the registered proprietors*.

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

- a certified copy of the transfer, dated and signed by all parties
- a title search showing the applicant(s) as the registered proprietor(s)*
- evidence that consideration has been paid*
- evidence of total value of property (house and land).

Contract to build a home

- a certified copy of your contract to build, dated and signed by all parties
- a title search showing the applicant(s) as the registered proprietor(s)*
- a certified copy of the final inspection report or occupation certificate*
- evidence of the unencumbered value (land only).

Owner builder

- a title search showing the applicant(s) as the registered proprietor(s)
- a certified copy of the initial inspection report or approval from Council for the laying of foundations
- a certified copy of the final inspection report or occupation certificate
- a certified copy of receipts for the home totalling more than the grant amount
- evidence of the total value of property (house and land).

* Not required of your application is lodged with an approved agent

APPROVED AGENT OR OSR USE ONLY

Name of person sighting the documentation above

Name of employer

Signature