



Office of State Revenue
NSW TREASURY

ISO 9001-Quality Certified

ABN: 77 456 270 638

OFH 001 03/08

First Home Owner Grant Act 2000

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 6 and keep for your reference.
- This form applies for applications lodged on or after 14 February 2008.

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
- ✓ 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
- ✓ lodge an application within 12 months of completion of the eligible transaction

NOTE: Applications cannot be lodged with OSR until the *eligible transaction* has been completed.

See Terms used for meaning 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). Refer to page 4 for contact details.

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. Refer to page 4 for contact details.

Do not send original documents. Only send **certified copies** (for persons who can certify copies – refer to 'Terms used' on page 5).

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 OR
- citizenship certificate

If a New Zealand citizen:

- current passport.

NOTE: New Zealand citizens must be living in Australia at the date of application.

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 date of application.

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.

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).

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

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
- divorced, a *certified copy* of your divorce certificate
- widowed, a *certified copy* of the death certificate of your *spouse/partner*
- 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.

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)*.

Where there is no written contract or the transaction is a related or associated party purchase:

- a copy of the transfer 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.

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.

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

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 issued by council or a Final Inspection Certificate*
- *title search* showing the applicant(s) as the registered proprietor(s)* (*certified copy* not required).

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

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 issued by council 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).

* Not required if the application is lodged with an *approved 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 <i>new</i> or <i>established</i> home	<i>Approved agent</i>	At date of settlement by <i>approved agent</i> .
Purchase of a <i>new</i> or <i>established</i> home	OSR	Within 14 days of lodging a complete application, a payment made to your nominated bank account by OSR.
<i>Contract to build</i>	<i>Approved agent</i>	On date of first progress payment by <i>approved agent</i> .
	OSR	Within 14 days of lodging application with evidence of completion, a payment made to your nominated bank account by OSR.
<i>Owner builder</i>	<i>Approved agent</i>	On receipt of the occupation certificate to <i>approved agent</i> .
	OSR	Within 14 days of lodging application with evidence of completion, a payment made to your nominated bank account by OSR.
<i>Terms contract</i>	OSR	Within 14 days of lodging application with evidence of possession, 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*.
- It is the responsibility of the applicant to satisfy the *Commissioner* that they have met the residency requirement. Applicants may be required to verify this later by providing documentation supporting their period of occupancy.
- Should you not meet the residency 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.

OFFICES (8.30 am – 4.30 pm, Monday to Friday)

Parramatta

Lang Centre, cnr Hunter & Marsden Streets
 GPO Box 4042, Sydney NSW 2001
 DX 456 Sydney

Sydney

Level 3, 55 Hunter Street
 (not a postal address – counter services only)

Newcastle

Level 2, 97 Scott Street
 PO Box 511, Newcastle NSW 2300
 DX 7860 Newcastle

Wollongong

Level 6, 90 Crown Street
 PO Box 666, Wollongong NSW 2520
 DX 5245 Wollongong

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.

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 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, 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*).

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 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*.

OSR

The Office of State Revenue, New South Wales.

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. This home must be occupied by an applicant 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:

- (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*. 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/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 Department of Lands website: www.lands.nsw.gov.au

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*.

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. To be eligible for the grant an applicant must move into the home and maintain 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*.

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*, the agent will record all your payment details.

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 residency requirement, penalties of up to 100% 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.



First Home Owner Grant Act 2000

New South Wales

Application for First Home Owner 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 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" value="/ /"/>

SECTION 1 Eligibility criteria

NOTE:

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

Eligibility checklist

1. Is this the first time each <i>applicant</i> and/or their <i>spouse/partner</i> 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 <i>applicant</i> and their <i>spouse/partner</i> a person who has never owned a <i>residential property</i> , 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 <i>spouse/partner</i> have held a <i>relevant interest</i> in <i>residential property</i> prior to 1 July 2000, even if they have never occupied the property.	<input type="checkbox"/> YES	<input type="checkbox"/> NO
3. Is each <i>applicant</i> and their <i>spouse/partner</i> a person who has never occupied a <i>residential property</i> for a continuous period of at least six months in which they acquired a <i>relevant interest</i> on or after 1 July 2000 in any state or territory of Australia?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
4. Is each <i>applicant</i> a <i>natural person</i> (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 <i>applicant</i> a <i>permanent resident</i> or Australian citizen?	<input type="checkbox"/> YES	<input type="checkbox"/> NO
6. Will at least one <i>applicant</i> 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"/> 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 <i>home</i> in New South Wales OR ▪ entered into a contract to have the <i>home</i> built in New South Wales OR ▪ in the case of an <i>owner builder</i>, 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?

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 No

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

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

Applicant 1 (Contact applicant)

Applicant 2

Title Mr Mrs Miss Ms Dr Mr Mrs Miss Ms 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

Have you ever used any name other than the name(s) declared above? Yes – list name(s) below No

--	--

Date of birth (dd/mm/yyyy)

Place of birth

State/Territory	State/Territory
Country	Country

Daytime phone number ()

Email address

Current residential address

Street no.	Street no.
Street name	Street name
Suburb/town	Suburb/town
State	Postcode

Address for service of notices (if different from above)

Street no.	Street no.
Street name	Street name
Suburb/town	Suburb/town
State	Postcode

Do you have a *spouse/partner*? Yes No Yes No

If you have a *spouse/partner*, will your *spouse/partner* have a *relevant interest* in the home? Yes No

▶ If 'Yes', your *spouse/partner* must complete the details as applicant 2 above.

▶ 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	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Middle name(s)	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Family name	<input style="width: 100%;" type="text"/>	<input style="width: 100%;" type="text"/>
Name on birth certificate (if different from above)	First name <input style="width: 100%;" type="text"/>	First name <input style="width: 100%;" type="text"/>
	Middle name(s) <input style="width: 100%;" type="text"/>	Middle name(s) <input style="width: 100%;" type="text"/>
	Family name <input style="width: 100%;" type="text"/>	Family name <input style="width: 100%;" type="text"/>
Has your <i>spouse/partner</i> 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 style="width: 100%; height: 50px;" type="text"/>	<input style="width: 100%; height: 50px;" type="text"/>
Date of birth (dd/mm/yyyy)	<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;" 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;" 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"/>
Place of birth	State/Territory <input style="width: 100%;" type="text"/>	State/Territory <input style="width: 100%;" type="text"/>
	Country <input style="width: 100%;" type="text"/>	Country <input style="width: 100%;" type="text"/>
Daytime phone number	(<input style="width: 20px;" type="text"/>) <input style="width: 100px;" type="text"/>	(<input style="width: 20px;" type="text"/>) <input style="width: 100px;" type="text"/>

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 N S W Postcode
 Date when occupation as a principal place of residence commenced or is intended to commence (if not known please estimate dd/mm/20yy) / / 2 0 Purchase or construction price \$

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

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

/ / 2 0

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

/ / 2 0

NOTE: If lodging with an *approved agent*, please estimate

APPROVED AGENT AND OSR USE ONLY

All evidence sighted Name of person sighting the evidence

Payment eligibility date / / 2 0 (Enter settlement, completion or first draw down date only)

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

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.

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"/>	* DO NOT include dashes or spaces

APPROVED AGENT USE ONLY

Applicant reference

SECTION 6 Declaration by applicant(s)

- I have completed the application form and attached all relevant documents in support of this application.
- 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 at least six months, a *residential property* within Australia in which I acquired a *relevant interest* on or after 1 July 2000.
- I declare that the interest I hold in the property is not held subject to a trust.
- I declare that at the date of lodgement of this application at least one applicant for the grant is a *permanent resident* or an Australian citizen.
- 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*.
- 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*.
- 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.
- I authorise *OSR* to access and exchange information about me to verify my eligibility for the First Home Owner Grant with the *approved agent* (where applicable), other State, Territory and Australian Government agencies and commercial organisations as permitted by law.
- 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.
- 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.
- I authorise the *Commissioner* to address all correspondence relating to this application to Applicant 1 at the address nominated.
- 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.
- 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 type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/20yy)	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 2 0 <input type="text"/> <input type="text"/>	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> 2 0 <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"/> Postcode <input type="text"/>	State <input type="text"/> Postcode <input type="text"/>

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

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 held a *relevant interest* on or after 1 July 2000.
- I authorise *OSR* to access and exchange information about me that may affect the applicant's eligibility for the First Home Owner 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 making a false or misleading statement on or in connection with this application for the grant.

	Spouse/partner of Applicant 1	Spouse/partner of Applicant 2
Name	<input type="text"/>	<input type="text"/>
Signature	<input type="text"/>	<input type="text"/>
Date (dd/mm/20yy)	<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)*	<input type="text"/>	<input type="text"/>
Full name and address of witness	<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"/>
	State Postcode	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*

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 residency requirement, penalties of up to 100% 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 4042 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 _____ / _____	<input type="checkbox"/>	<input type="checkbox"/>
Category 2*	Type of document submitted _____ / _____	<input type="checkbox"/>	<input type="checkbox"/>
Category 3*	Type of document submitted _____ / _____	<input type="checkbox"/>	<input type="checkbox"/>
Category 4*	Type of document submitted _____ / _____	<input type="checkbox"/>	<input type="checkbox"/>
▪	a Decree Nisi, a marriage or death certificate or change of name certificate	<input type="checkbox"/>	<input type="checkbox"/>
▪	a statutory declaration for those who are separated.	<input type="checkbox"/>	<input type="checkbox"/>

Transaction type

Contract to purchase a home			
▪	a <i>certified copy</i> of your Contract for Sale, dated and signed by the vendor	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>title search</i> showing the applicant(s) as the registered proprietor(s)*	<input type="checkbox"/>	<input type="checkbox"/>
Where there is no contract, or the sale of the property is between family members or related or associated parties:			
▪	a copy of the transfer, dated and signed by all parties	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>title search</i> showing the applicant(s) as the registered proprietor(s)*	<input type="checkbox"/>	<input type="checkbox"/>
▪	evidence that <i>consideration</i> has been paid*.	<input type="checkbox"/>	<input type="checkbox"/>
Contract to build a home			
▪	a <i>certified copy</i> of your <i>contract to build</i> , dated and signed by all parties	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>title search</i> showing the applicant(s) as the registered proprietor(s)*	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>certified copy</i> of the final inspection report or occupation certificate*.	<input type="checkbox"/>	<input type="checkbox"/>
Owner builder			
▪	a <i>title search</i> showing the applicant(s) as the registered proprietor(s)*	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>certified copy</i> of the initial inspection report or approval from Council for the laying of foundations	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>certified copy</i> of the final inspection report or occupation certificate	<input type="checkbox"/>	<input type="checkbox"/>
▪	a <i>certified copy</i> of receipts for the <i>home</i> totalling more than the grant amount*.	<input type="checkbox"/>	<input type="checkbox"/>

* Not required if 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

Date