



City of Lodi Fixed Income Discount Application

Application Date: _____

Section 1

APPLICANT INFORMATION		
Last Name:	First Name:	Account #: (or Mobile Home Park Name)
Service Address:		Phone: () -
Mailing Address:		Number in household: Adults: Children:

Section 2

QUALIFICATIONS FOR FIXED INCOME DISCOUNT:

- You must be at least 62 years old
- Your total household income must be less than \$45,000 annually
- At Least 80% of your income must be from a fixed source

Questions? Call (209) 333-6717

Section 3

INCOME DOCUMENTATION

- o Attach copies of all income documentation. Your application is considered incomplete without the required documentation. You must include proof of income for ALL members of the household. Documents submitted will NOT be returned. Please refer to the Fixed Income application Worksheet for a list of acceptable documents.
- o You must also include a copy of your most recent income tax return if you are required to file under Federal income tax guidelines. Please include a copy of Form 1040 (Pages 1 and 2, including Adjusted Gross Income and a signature). If you are self-employed, you must also include a copy of Schedule C.
- o If you have any questions regarding appropriate documents, please contact us at (209) 333-6717 for assistance.

Section 4

DECLARATION AND SIGNATURE

By signing this application, I certify under penalty of perjury that the information provided on this application is true and correct under the laws of the State of California. I understand that the City of Lodi reserves the right to request verification of continued economic need at any time and I will notify the City of Lodi Finance Department of any changes that affect my eligibility. The City of Lodi may also share this information with other utility companies. I understand that the City of Lodi has the right to re-bill me at the applicable rate, if appropriate. I understand if I qualify, my discount will appear as soon as practical after the completed application has been received and verified. The City of Lodi will routinely contact me to verify eligibility. I understand that failure to provide any requested documentation to verify my eligibility will result in disqualification and removal from the Fixed Income discount rate.

Applicant Signature _____

Mail Completed Applications and Documents to: 310 W Elm St, Lodi CA 95240

City of Lodi Fixed Income

Household Income Worksheet

GROSS Annual FIXED Income

AFDC/ TANF/Cal Fresh/SNAP \$ _____
____(Examples of documentation: Notice of Action;
Computer Printout; Benefit Letter)

Child/ Spousal Support \$ _____
____(Examples of documentation: Divorce Decree,
Agreement, Court Order Documents)

Disability/ Unemployment \$ _____
____(Examples of documentation: Agency Printout
Verifying Amount)

Pensions/ Annuity/ 401K/ IRA \$ _____
____(Examples of documentation: Monthly/Quarterly
Bank Statements; Bank/Agency Statement of Income)

SSA/ SSI/ SSP \$ _____
____(Examples of documentation: Benefit Letter;
Bank Statement; Check)

GROSS Annual NON-FIXED Income

Stock/ Bond/Interest Income \$ _____
____(Examples of documentation: Monthly/ Quarterly
Bank Statements; Bank/Agency Statement of Income)

Rental Property Income \$ _____
____(Examples of documentation: Bank Statements;
Tax Return)

Wages/ Commissions \$ _____
____(Examples of documentation: Current Stubs Covering
2 Months Showing Gross Income; Bank Statements
Covering 2 Months)

All Other Income \$ _____
____(Please specify source and include proof of income)

Non-Cash Benefits \$ _____
____(Include non-cash benefits available for living expenses
such as section 8 housing; housing compensation from
Employer or other sources. Examples of documentation
include housing vouchers; contract agreements)

A: Total Fixed Income \$ _____

B: Total Non-Fixed Income \$ _____

C: Total Annual Income (Add A & B) \$ _____ (Must be less than \$45,000 to qualify)

D: Multiply Line C X 80% \$ _____ (Line A must be greater than this line)

Fixed Income Program Requirements

- The City of Lodi utility account must be in your name and you must live at the address where the discount is received.*
- You must promptly notify the City of Lodi if you no longer qualify for the Fixed Income Discount.
- You may not be claimed on someone else's tax return other than your spouse.
- You will routinely be asked to re-qualify for the program and will need to provide current proof of income.
- The discount only applies to residential metered rates.
- The City of Lodi reserves the right to deny applications with unverifiable income.
- You may be required to complete a survey of income and expenses application.
- "Gross Household Income" is defined as ALL money and non-cash benefits available for living expenses from all sources, both taxable and nontaxable, before deductions for ALL people who live in the home. This includes but is not limited to: wages, salaries and commissions; self-employment; child/spousal support; interest dividends or withdrawals from savings accounts, stocks and bonds or retirement accounts such as IRA and 401K accounts; stocks; bonds; business or rental income; support from family or friends; cash gifts; loans; lottery winnings; tax refunds; money from insurance policies or legal settlements; Social Security; retirement, Veterans, disability or unemployment benefits and workers compensation; AFDC; SSI; SSP; cash public assistance; food stamps and free housing or utilities; school grants, loans, scholarships or other aid.

* For sub-metered customers, your bill from your manager must be in your name.