

City of Lodi

2016 Senior 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)

Senior 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.