

First Home Owner Grant

Important:

- To help determine if you qualify for a grant, please answer the questions below by ticking (✓) the appropriate box.
- If there are more than two applicants, please complete and attach a second application form.
- Incomplete application forms, or applications lacking any of the supporting documentation required, will be returned.

OFFICE USE ONLY

UIN _____
AA reference _____
AA branch _____

SECTION 1 – ELIGIBILITY CRITERIA

- All decisions relating to the eligibility of an applicant are made by the State Revenue Office (SRO), therefore any further information required should be directed to the SRO. Please note that there are significant penalties for making false or misleading statements.

APPLICANT ELIGIBILITY CRITERIA

- All applicants must be considered when answering the eligibility questions.

- All applicants must be at least 18 years of age at the time of settlement or completion of construction.

1. Will this be the first time each applicant and their partner will receive a grant under a First Home Owner Grant Act 2000 in any State or Territory of Australia?

Yes No

2. Does each applicant and their partner declare that they have never held a relevant interest in residential property, either jointly, separately or with some other person before 1 July 2000, in any State or Territory of Australia?

Yes No

3. Does each applicant and their partner declare that they have never occupied a residential property in which they held a relevant interest either jointly, separately or with some other person, on or after 1 July 2000, in any State or Territory of Australia?

Yes No If "No", for what period was the property occupied as a place of residence?

4. Is each applicant a natural person? (eg not a company.)

Yes No

5. Will at least one applicant be a permanent resident or Australian citizen at the time of either settlement or completion of construction?

Yes No

6. Will at least one applicant be occupying the home as his or her principal place of residence for a continuous period of at least 6 months, commencing within 12 months of either settlement or completion of construction?

Yes No

TRANSACTION ELIGIBILITY CRITERIA

7. Has each applicant on or after 1 July 2000:

- Entered into a Contract of Sale or Agreement for the purchase of an established home, a new home or a home off the plan in Victoria?

OR

- Entered into a contract to build a home on their land in Victoria?

Yes No

OR

- In the case of owner builders, commenced construction (laying of foundations) of a home on their land in Victoria

Determination of eligibility

- If you answered 'Yes' to questions 1-7, you may be entitled to receive the First Home Owner Grant, subject to the decision being made by the Commissioner of State Revenue.

PLEASE NOTE THAT THERE ARE SIGNIFICANT PENALTIES FOR MAKING A FALSE OR MISLEADING STATEMENT.

SECTION 2 – APPLICANT DETAILS

Please complete a second application form and attach it to this application where there are more than two applicants.

Number of persons with a relevant interest in the property that has been or will be acquired

(refer to 'Important Definitions' for what is a relevant interest)

Please print

Applicant 1

Mr Mrs Miss Ms

Applicant 2

Mr Mrs Miss Ms

First name

Middle name(s)

Family name

Please provide name on birth certificate or any other previous name(s) if different to above.

Original first name

(i)

Original middle name(s)

(ii)

Original family name
(including maiden name)

(iii)

Date of birth

D D M M Y Y Y Y

D D M M Y Y Y Y

Place of birth

State/Territory

Country

Daytime contact telephone number

()

()

Current residential address

State Postcode | | | |

State Postcode | | | |

Do you have a partner?

Yes

If Yes, please answer next question.

No

If No, please go to Section 4.

Yes

If Yes, please answer next question.

No

If No, please go to Section 4.

Will your partner also have a relevant interest in the property to which this application relates?

Yes

If Yes, your partner must complete applicant details.

No

If No, your partner must complete Section 3.

Yes

If Yes, your partner must complete applicant details.

No

If No, your partner must complete Section 3.

Address for service of notices
(if different to above)

State Postcode | | | |

State Postcode | | | |

SECTION 3 – PARTNER DETAILS

Only complete this section if you are the partner of an applicant and you do not/will not have a relevant interest in the residential property.

- Please note that for eligibility purposes the partner of an applicant cannot have held a relevant interest in a residential property prior to 1 July 2000 and cannot have occupied a residential property in which they held a relevant interest on or after 1 July 2000.

PARTNER PARTICULARS

Please print	Partner of Applicant 1	Partner of Applicant 2
	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>	Mr <input type="checkbox"/> Mrs <input type="checkbox"/> Miss <input type="checkbox"/> Ms <input type="checkbox"/>
First name	<input type="text"/>	
Middle name(s)	<input type="text"/>	
Family name	<input type="text"/>	
<i>Please provide name on birth certificate or any other previous name(s) if different to above.</i>	<input type="text"/>	
Original first name	<input type="text"/>	
Original middle name(s)	<input type="text"/>	
Original family name (<i>including maiden name</i>)	<input type="text"/>	
Date of birth	D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y	D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y
Place of birth	State/Territory <input type="text"/>	<input type="text"/>
	Country <input type="text"/>	<input type="text"/>
Current residential address	<input type="text"/> <input type="text"/>	
	State <input type="text"/>	Postcode <input type="text"/> <input type="text"/> <input type="text"/>
	State <input type="text"/>	Postcode <input type="text"/> <input type="text"/> <input type="text"/>

PARTNER DECLARATION

I declare that the partner details above and the answers provided in questions 1, 2 and 3 of the eligibility criteria in Section 1 are true and correct so far as they relate to me.

I give authorisation for the approved agent to have access to any information held by the agent that may affect the applicant's eligibility for the First Home Owner Grant and to disclose that information to the SRO for the purpose of administering the scheme.

Partner of applicant 1

Name <input type="text"/>
Signature <input type="text"/>
Date D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y

Partner of applicant 2

Name <input type="text"/>
Signature <input type="text"/>
Date D <input type="text"/> D <input type="text"/> M <input type="text"/> M <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y <input type="text"/> Y

SECTION 4 – DETAILS OF HOME PURCHASED OR LAND ON WHICH IT IS SITUATED

Address <input type="text"/>	State <input type="text"/>	Postcode <input type="text"/> <input type="text"/> <input type="text"/>
<input type="text"/>	<input type="text"/>	<input type="text"/>

Intended date of occupancy
 D D M M 2 0 Y Y Y Y

Consideration/Cost of home
 \$

Volume
(If current title number unavailable, enter parent title number)

Type of property (Please tick (✓) one box)

Established home <input type="checkbox"/> OR New home -newly constructed, never occupied, first sale <input type="checkbox"/> OR Purchase off-the-plan, house and land package <input type="checkbox"/> OR Contract to build a new home <input type="checkbox"/> OR Owner-builder of a new home <input type="checkbox"/>
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SECTION 5 – PAYMENT DETAILS IF APPLYING THROUGH THE STATE REVENUE OFFICE

- Complete this section **only if you are lodging this application directly to the SRO.**
- For your convenience and speed of payment, please complete the **EFT details** for the account into which you would like the grant to be paid. If you prefer, payment may be made by cheque.

Electronic Funds Transfer

Financial Institution

Account name

Account BSB

Account no.

* Please check with your Financial Institution that the account details are correct.

* Incorrect details may cause a delay in payment of grant.

Payment by cheque

Name and address of payee

Postcode

Would you like to offset the grant against stamp duty liabilities in respect of this transaction?

Yes

No

(If "Yes", the original fully executed transfer of land form is required to be lodged)

SRO USE ONLY

Stamp duty amount

\$

Balance of grant to be paid

\$

SECTION 6 – DECLARATION

- I have completed and submitted the application form and all relevant supporting documents in support of my application and to my knowledge they are true and correct. I agree that all correspondence relating to this application may be sent to the address of Applicant 1 or the specified address for correspondence.
- I undertake to notify the Commissioner of State Revenue of any notifiable event relevant to the legislation requirements under the *First Home Owner Grant Act 2000* within 14 days from the occurrence of this event, and I have read and understood the information prepared by the SRO 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/we will occupy the purchased property as my/our principal place of residence for a continuous period of at least 6 months commencing within 12 months of settlement or completion of construction.
- I authorise the approved agent to access any information held about me that may affect the eligibility of the applicant(s) for the First Home Owner Grant and release this information in good faith to the SRO for use in the SRO's administration of the scheme.
- I understand that the approved agent is not authorised by the SRO to offer any advice or assistance on the conditions of eligibility for the grant, or in the completion of this application, and I authorise the grant to be held by the approved agent until the completion of the eligible transaction.
- I authorise the agent to repay the grant to the Commissioner of State Revenue if the transaction to which this application relates is not completed within 28 days of the date scheduled for payment by the approved agent.
- I understand that the SRO may give some of this information to other government agencies authorised by law to receive it.
- I authorise the Commissioner of State Revenue to pay the grant to the account nominated by the applicant in Section 5 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. I also declare that I have not previously received 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 or if I have previously received it, it has been repaid.

Applicant 1

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

Applicant 2

Name

Signature

Date

D	D	M	M	Y	Y	Y	Y
---	---	---	---	---	---	---	---

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Payment Eligibility Date
(settlement/certificate of occupancy or first progress payment)

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

AA reference number

Contract date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Commencement date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Completion date

D	D	M	M	2	0	Y	Y
---	---	---	---	---	---	---	---

Applicant's nominated account

Account name

Account BSB

Officer signature

All documentation sighted

Account no.

First Home Owner Grant Act 2000

Information Privacy Act 2000

All information collected by the SRO is protected by secrecy provisions in Acts administered by the SRO and in addition, personal information you provide to the SRO is protected by the Information Privacy Act 2000. Any information collected from you is only used for the purposes of the Acts administered by the SRO. Information (including personal information) is not disclosed to third parties unless authorised by law, or with your consent.

First Home Owner Grant

The Victorian Government is helping first home buyers to buy or build a home through the \$7,000 First Home Owner Grant (FHOG). Use this form to apply for the FHOG.

WHAT HOMES QUALIFY?

A new or established dwelling including a house, flat, unit, townhouse or apartment anywhere in Victoria that meets local planning standards. A houseboat, vacant land or mobile home is not eligible. The dwelling must be occupied as your principal place of residence for a continuous period of at least 6 months commencing within 12 months of the date of settlement in the case of an established home or, the date construction is completed in the case of a new home. The contract to purchase an established home or to build a new home must be signed on or after 1 July 2000.

HOW DO I APPLY?

Applicants can complete and lodge an application form with either an approved agent, which includes approved financial institutions, or the State Revenue Office of Victoria. You are only able to complete and lodge an application form with a financial institution when you are borrowing funds from that financial institution, as part of buying or building your home. You need to apply within 12 months of settlement or completion of construction.

A complete list of approved First Home Owner Grant agents is available on the State Revenue Office Website - www.sro.vic.gov.au.

Supporting Documentation

If applying via an Approved Agent the following documents are required:

1. The completed application form.
2. a. The original fully executed Contract of Sale or Contract to Build.
b. For owner builders, the original Certificate of Occupancy and proof of the date of laying of the foundations, such as the receipt/invoice for the concrete, evidence from local council or some other evidence.

Note: Nominee purchaser - if you did not sign the contract of sale but were nominated by the purchaser to take a transfer of the property, you will have to provide evidence that you provided valuable consideration for the purchase. This can take the form of:

- evidence of payment of purchase monies by the nominee (copies of bank cheques, bank statements etc.)
- evidence of a mortgage given by the nominee over the property;
- evidence that the nominee is a party to a loan agreement in respect of the property.

If applying via the State Revenue Office of Victoria the following documents are required:

Note: All original supporting documentation will be returned to applicant 1 at the address for service of notices upon completion of processing.

1. The completed application form.
2. Photographic proof of identity (certified copy).
3. The original fully executed Contract of Sale or Contract to Build (no photocopies).
4. a. For an established home and a new home, a photocopy of the fully executed transfer of land form showing stamp duty paid, or, where the grant is to be offset against the stamp duty payable, the original fully executed transfer of land form.
Note: Transfers between related parties will have to provide a photocopy of the fully executed transfer of land form showing duty paid and the Land Registry Victoria Dealing number.
b. For Contracts to Build a certified copy of the Certificate of Occupancy
c. For owner builders, a certified copy of the Certificate of Occupancy and proof of the date of laying of the foundations, such as the receipt/invoice for the concrete, evidence from local council or some other evidence.
5. Nominee purchaser - if you did not sign the contract of sale but were nominated by the purchaser to take a transfer of the property, you will have to provide evidence that you provided valuable consideration for the purchase. This can take the form of:
- evidence of payment of purchase monies by the nominee (copies of bank cheques, bank statements etc.)
- evidence of a mortgage given by the nominee over the property;
- evidence that the nominee is a party to a loan agreement in respect of the property.

Certified Copies

A copy of an original that has been sighted by an authorised person and who has noted on the copy that it is a true copy of the original which has been produced and shown to the person certifying. An authorised person includes: A member of the police force, a councillor of a municipality, a medical practitioner, a dentist, a veterinary practitioner, a pharmacist, a minister of religion, a legal practitioner, a school principal or an accountant.

Partner

If your partner is also an applicant, their details need to be completed under the Section 2 details of the form. If your partner is not an applicant, their details must be recorded in Section 3 of this application.

WHEN WILL THE GRANT BE PAID?

If applying via an approved agent (Financial Institution)

- | | |
|------------------------------|--|
| Established home | payment will be at settlement. |
| Contract to Build | payment will be at the time of the first progressive payment to the builder. |
| Owner builder | payment will be on receipt of the Certificate of Occupancy. |
| New home | payment will be at settlement. |
| Purchase off-the-plan | payment will be at settlement. |

If applying via the State Revenue Office of Victoria

- | | |
|------------------------------|--|
| Established home | payment will be after settlement. |
| Contract to build | payment will be after Certificate of Occupancy/Completion. |
| Owner builder | payment will be after Certificate of Occupancy/Completion. |
| New home | payment will be after settlement. |
| Purchase off-the-plan | payment will be after settlement. |

Payment may take up to 14 days to process through the SRO

First Home Owner Grant

IMPORTANT DEFINITIONS

Applicant(s)

A person or persons who, on completion of the purchase or construction of the home, will be an owner of that home.

Consideration

Purchase price or cost of construction of the home.

Established home

A building affixed to the land that may lawfully be used as a place of residence.

New home

A building affixed to the land that may lawfully be used as a place of residence, that has never been occupied as a residence, including occupation by the builder, a tenant or any other occupant.

Purchase off-the-plan

A contract, not being a comprehensive building contract, for the purchase of a land and building package where construction has not been completed at the date of the contract of sale. (For example, House and Land package.)

Contract to build

A comprehensive building contract under which a builder agrees to build a complete home from the start of building to when it is ready for occupancy.

Owner-builder

An owner of land who builds a home, or has a home built, on their land without entering into a comprehensive building contract.

Home owner

A person who holds a relevant interest in land on which a home is built.

Relevant interest

A person with a 'relevant interest' can be described generally as someone who will have a legal entitlement to the home being purchased or constructed. Normally, this will be the person(s) listed on the title. Other forms of relevant interest are defined in the *First Home Owner Grant Act 2000*. Each person with a 'relevant interest' must be listed as an applicant on this form.

Nominee Purchaser

An applicant for the grant who was not a party to the contract of sale, but who was nominated by the purchaser to take a transfer of the property.

Notifiable event

When any part of the eligibility criteria is not met, the applicant(s) must notify the Commissioner of State Revenue. For example, when the residency requirement is not met.

Residential property

Land on which there is a building which is a lawfully occupied residence or suitable for occupation as a residence.

Natural person

A person, not a company.

Permanent resident

Holder of a permanent visa. This includes New Zealand citizens holding a special category visa under Section 32 of the *Migration Act 1958*.

Partner

A partner of a person is a person's spouse or their domestic partner.

Domestic Partner

A domestic partner of a person means a person to whom the person is not married but with whom the person is living as a couple on a genuine domestic basis (regardless of gender).

Spouse

A person is a spouse of another if they are legally married to each other.

PENALTIES

There are substantial penalties for making false or misleading statements in or in connection with an application.

The State Revenue Office of Victoria, as part of its role in administering the *First Home Owner Grant Act 2000* has the authority to conduct regular investigations to ensure that applicants comply with the Act. The following penalties may be imposed:

- A penalty of up to \$6,000 for making a false or misleading statement in or in connection with an application for a first home owner grant as specified in the *First Home Owner Grant Act 2000*.
- A penalty of up to \$7,000 may be imposed by the Commissioner as a result of an applicant's dishonesty where an amount is paid by way of a first home owner grant, along with repayment of the grant pursuant to the Act.
- A penalty of up to \$7,000 may also be imposed where an applicant fails to repay an amount under the Act.
- Interest is payable on any required repayment which is unpaid or on any unpaid penalty, calculated on a daily basis from the last day for payment until the amount or penalty is paid at the rate applicable under the *Taxation Administration Act 1997*.

APPEALS PROCESS

You can lodge a written objection to the decision made by the Commissioner of State Revenue on the application.

Please forward your objection together with relevant supporting documentation to the Review Branch of the SRO within 60 days after the date of decision.

By correspondence

State Revenue Office, GPO Box 1641N, MELBOURNE VIC 3001

In person

State Revenue Office, Ground Floor, 505 Little Collins Street, Melbourne

Internet

www.sro.vic.gov.au

sro@sro.vic.gov.au

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