

Application form and lodgement guide

Note:

- Phrases and words in *italics* are explained on pages 5–6 under Terms Used.
- Before lodging the application remove pages 1 to 8 and keep for your reference.
- This form applies for applications lodged on or after **31 March 2010**.

Each applicant should read this information before completing and submitting the application form

Your obligations

As an *applicant* for the First Home Owner Grant, you must ensure that the information contained in your application for the grant is complete and correct.

The provision of false or misleading information to the Commissioner is an offence against the *First Home Owner Grant Act 2000*. Therefore, if you are unsure about any of your obligations or any of the information required in the application, it is important that you visit our website www.osr.qld.gov.au or contact the Office of State Revenue for clarification.

If your application is approved and the grant is paid, you will be notified in writing of the conditions you are required to satisfy, including the residence requirement. If you are unable to satisfy any of these conditions, you must notify the *Commissioner* within **14 days** of becoming aware that you are unable to comply with the requirement and repay the grant.

If you do not meet these obligations, you may be subject to penalties.

Lodgement guide

To apply:

■ **Applicants must:**

- ✓ lodge a completed application and all supporting documents within 12 months of *completion of the eligible transaction*.
- ✓ be a *natural person* (i.e. not a company), at least 18 years of age at the *commencement of the eligible transaction*.
- ✓ ensure at least one *applicant* is an Australian citizen or a *permanent resident* at the time of completion of this application form.
- ✓ be buying or building a *home* or building a *home* as an *owner builder*.
- ✓ ensure each person holding a *relevant interest* in the *home* is an *applicant*.
- ✓ ensure **all applicants** 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*.
- ✓ acquire a *home* that has a *cap value* that is less than the *cap amount* (see Terms Used).

■ **Applicants and their spouse/de facto 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 *residential property* anywhere in Australia before 1 July 2000.
- ✓ not have occupied *residential property* in which you acquired a *relevant interest* anywhere in Australia on or after 1 July 2000.

How to lodge your application

You can lodge your application with:

- the approved bank or financial institution (*Approved Agent*) who is providing your finance. A list of *Approved Agents* can be found at www.osr.qld.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*.
- the Office of State Revenue (OSR). Refer to page 16 for address details.

Note: Applications cannot be lodged with OSR until *completion of the eligible transaction*.

Supporting evidence

If lodging with an *Approved Agent* – each *applicant* and their *spouse/de facto partner* must provide 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:

Proof of identity

Each *applicant* and their *spouse/de facto 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. More information is available at www.osr.qld.gov.au or please contact OSR. Refer to page 16 for contact details.

If you are unable to provide the preferred documents, please contact OSR to discuss your circumstances. Refer to page 16 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.

Persons born in Australia

- Australian birth certificate/extract
- Current Australian Passport.

Persons born overseas

- Australian citizenship certificate
- Current passport with proof of permanent visa or special category visa
- Certificate of residence issued by the Department of Immigration.

Note: At least one *applicant* must be a *permanent resident* or citizen of Australia at the date of application.

Non-applicant *spouses* and additional *applicants* do not need to provide evidence of their visa or citizenship, however, they are still required to provide a current passport or birth certificate.

New Zealand Citizens must be living in Australia at the date of application.

Category 2* – link between identity and person – photo and signature – provide one document.

A current:

- Australian Driver Licence
- Passport
- Firearm Licence
- 18+ Card.

Category 3* – evidence that the *applicant* resides in Australia – provide one document.

- Medicare Card
- Motor Vehicle Registration
- Concession or Department of Veterans Affairs Card
- Debit/Credit Card of a financial institution.

Category 4* – Evidence of *applicant's* residential address – provide one document.

- Utility documents of residential address (e.g. bills for electricity, gas, water etc.)
- Insurance Policy with current residential address
- Statement of account of a financial institution.

*** Not required if application is lodged through an *Approved Agent*.**

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*.

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 Decree Nisi
- Widowed – a *certified copy* of the death certificate of your *spouse/de facto partner*
- Separated – a statutory declaration with the following information:
 - the name of your former *spouse/de facto partner*
 - *spouse/de facto partner's* date of birth
 - the date you were married or commenced your domestic relationship
 - the date you separated
 - your former *spouse/de facto partner's* current address (if known)
 - whether or not you currently reside together and whether or not you have the intention to resume cohabitation.
- If you have any other names, please provide evidence such as a certificate of change of name issued by a government authority, or a statutory declaration that sets out all names by which you have been known.

Transaction type

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

A *Contract of Sale to purchase a new or established home or an off the plan home:*

- a copy of the executed *contract of sale*, dated and signed by all parties
- a copy of the registration confirmation statement or current *title search* showing the *applicant(s)* as the registered *owner(s)**

Where there is no **written contract**, or **the sale of the home is between related persons:**

- A copy of the stamped transfer
- A copy of the registration confirmation statement or current *title search* showing the *applicant(s)* as the registered *owner(s)* of the *home* purchased*
- *Certified copies* of evidence showing that *consideration* has been paid by the *applicant(s)* and received by, or on behalf of, the vendors
- Evidence of the *unencumbered value* of the *property* (see supporting documentation checklist for details of types of evidence accepted).

Purchase from a deceased estate – where you are acquiring property as a beneficiary under a Will, the application must be lodged with *OSR* with the following:

- a copy of the contract entered into with the executor
- a copy of the Will and Grant of Probate
- a 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 copy of the *contract to build* dated and signed by all parties
- A registration confirmation statement or current *title search* showing the *applicant(s)* as the registered *owner(s)**
- A copy of the final inspection certificate issued by your local council or building certifier*
- Evidence of the *unencumbered value* of the *property* (see supporting documentation checklist for details of types of evidence accepted).

*** Not required if the application is lodged with an *Approved Agent*.**

OR

C Owner builder

A copy of the:

- First inspection report for the laying of the foundations issued by your local council or building certifier
- Final inspection certificate issued by your local council or building certifier
- Building costs incurred for the construction of the *home**. The evidence submitted must total an amount equal to or greater than the amount of the grant and must not include your own labour costs
- A registration confirmation statement or current *title search* showing the *applicant(s)* as the registered *owner(s)**
- An independent third party valuation or market appraisal of the *home* dated on or after *completion of the eligible transaction*

*** Not required if the application is lodged with an *Approved Agent***

Note: Additional documents may be requested after lodgement of your application in order to confirm your eligibility for the grant. If you are unable to provide any of the documents above, please contact *OSR* to discuss your circumstances.

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 *OSR*. The following table details the various scenarios.

| Type of transaction | Applying through | Payment of grant |
|--|-----------------------|---|
| Purchase of a <i>new or established home</i> | <i>Approved Agent</i> | At date of settlement. The grant is paid by the <i>Approved Agent</i> . |
| | <i>OSR</i> | Within 10 working days of receiving a complete application and all supporting documentation. The grant is paid by <i>OSR</i> to your nominated bank account. |
| <i>Contract to build</i> | <i>Approved Agent</i> | On date of first progress payment as long as the payment is more than the grant payable. This does not include the deposit on the <i>contract to build</i> . The grant is paid by the <i>Approved Agent</i> . |
| | <i>OSR</i> | Within 10 working days of receiving a complete application and all supporting documentation. The grant is paid by <i>OSR</i> to your nominated bank account. |
| <i>Owner builder</i> | <i>Approved Agent</i> | On receipt of final inspection certificate. The grant is paid by the <i>Approved Agent</i> . |
| | <i>OSR</i> | Within 10 working days of receiving a complete application and all required supporting documentation. The grant is paid by <i>OSR</i> to your nominated bank account. |

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

- All *applicants* 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(s)* 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, within 14 days after the *relevant date*, you must notify *OSR* in writing and repay the grant.

Failure to advise the *Commissioner* in writing may result in the *applicant(s)* being required to repay the grant with penalties.

Terms used

- Applicant(s)** – 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.
- Cap Amount** –
- Where the *commencement of the eligible transaction* is on or after 31 March 2010: \$750,000
 - Where the *commencement of the eligible transaction* is between 1 January 2010 and 30 March 2010 (both dates inclusive): \$1 million
 - There is no cap amount if the *commencement of the eligible transaction* is prior to 1 January 2010.
- Cap Value** –
- For *contracts of sale* to purchase a new or established *home* (including *homes* purchased *off the plan*): the *consideration* paid for the *home*, or the *unencumbered value* of the *home* (whichever is the higher)
 - For *contracts to build*: the sum of (i) the *unencumbered value* of the land upon which the *home* is built/to be built; and (ii) the *consideration* paid for the *contract to build*
 - For *owner builders*: the sum of (i) the *unencumbered value* of the land upon which the *home* is built/to be built; and (ii) the *consideration* paid to build the *home* (excluding the builder's own labour).
- Certified copy** – A true copy of an original document that has been sighted and certified by a Justice of the Peace, Commissioner for Declarations or Notary Public.
- Alternatively, the *Commissioner* will also accept certification by an accepted person* that is 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, occupation, and be signed and dated.
- *An accepted person includes:
- | | |
|-----------------------------------|--|
| ■ A lawyer | ■ Pharmacist |
| ■ Magistrate | ■ Dentist |
| ■ Police Officer | ■ Medical practitioner |
| ■ Certified practising accountant | ■ Officer of <i>OSR</i> |
| ■ Member of parliament | ■ Employee of an <i>Approved Agent</i> . |
- Commencement of the eligible transaction** – Date of *contract of sale* to purchase or *contract to build* a home or, for an *owner builder*, the date laying of the foundations commenced.
- Commissioner** – Commissioner of State Revenue Queensland.
- Completion of the eligible transaction** – When the *applicant* is entitled to possession of the *home* under the contract **and** the *applicant* is registered on the title, or the building is ready for occupation as a place of residence **and** any prescribed completion requirements are met.
- Consideration** – Purchase price or cost of construction of the *home*.
- Contract of sale** – An agreement between an owner of a *home* and a buyer, for an agreed *consideration*.
- Contract to build** – A comprehensive home 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.
- Disqualifying arrangement(s)** – A disqualifying arrangement exists when an *applicant* for the grant has received *financial help* from a *related person* who is ineligible to receive the grant, and who will use the *home* frequently or to a significant extent **and** the *Commissioner* is not satisfied that there are genuine family reasons for the arrangement.
- A disqualifying arrangement also exists if the *Commissioner* is satisfied there is an arrangement the sole or main purpose of which is to obtain the grant rather than a *home*.
- Eligible transaction** – *Contract of sale* to purchase a *home*, *contract to build* a *home*, or construction of a *home* as an *owner builder*.
- Established home** – A *home* that has been previously occupied and is lawfully fit for occupation.

- Financial help**
- Any financial assistance, including:
 - a gift of money or property, whether or not the gift is enough for the *applicant* to buy or build the *home*
 - a contribution towards the purchase or construction of the *home* or the maintenance of the *home*
 - making a loan repayment for the *applicant* in respect of the *home*
 - forgiving a loan repayment owed by the *applicant*.
- Examples of what may constitute financial help include:
- giving funds for an *applicant* to purchase the *home*
 - transferring land on which the *home* is to be built or an existing *home* to an *applicant*, for less than market value of the land or *home*
 - building a *home* for an *applicant* for a discounted price
 - agreeing to pay any rates, utilities or repair and maintenance costs of the *home*
 - agreeing to act as a guarantor for an *applicant* on the *home* mortgage
 - agreeing to pay market rent for residing in an *applicant's home*
- Financial help can include:
- financial assistance given either before or after the *home* is purchased or built
 - financial assistance by indirect payment to a third party, for instance, to pay a debt owed by an *applicant* to the third party
 - financial assistance that is indirect payment from a third party, i.e. a company or trust for which a *related person* is a director or trustee.
- Financial help does not include:
- a commercial loan from an authorised deposit taking institution listed by the Australian Prudential Regulatory Authority at <http://www.apra.gov.au/adi/ADIList.cfm>.
- Home**
- A building, affixed to land, that may be lawfully used as a place of residence and is suitable for use as a place of residence.
Refer to the OSR website for further information.
- Home owner**
- See description of an *owner*.
- Natural person**
- A person/individual (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.
Refer to the OSR website for further information.
- Notifiable event**
- When any part of the eligibility criteria is not met, the *applicant(s)* **must notify the Commissioner within 14 days of the relevant date**.
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 of sale* for the purchase of a *home* on a proposed lot in an unregistered plan of a subdivision of land.
- OSR**
- The Office of State Revenue Queensland.
- Owner or home 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*.
- Permanent resident**
- A person who holds a permanent visa (under section 30 of the *Migration Act 1958* (Cwth)) or a New Zealand citizen who is the holder of a special category visa (under section 32 of the *Migration Act 1958* (Cwth)).
- Principal place of residence**
- The *home* you primarily reside in. This *home* must be occupied by **all applicants** for a continuous period of at least six months commencing within 12 months of *completion of the eligible transaction*.
Refer to OSR website for further information.
- Property**
- Under the *First Home Owner Grant Act 2000*, *property* means:
 - (a) a home; or
 - (b) land; or
 - (c) a relevant interest in land.

- Related person** – A related person of an applicant means:
- a parent, child, grandparent, sibling, uncle or aunt of the applicant
 - the spouse of any of the persons listed above.
- Relevant date** – The relevant date is the **earlier** of the following:
- (a) 12 months after *completion of the eligible transaction*
 - (b) the date on which the *applicant* becomes aware that the residence requirement will not be complied with.
- Relevant interest** – A relevant interest may be described as an interest held by an individual that grants them legal entitlement to, and a right to occupy, the *home*. Generally, the holder of this interest will be the registered *owner* of the *home*.
- Under the *First Home Owner Grant Act 2000* a relevant interest in land is:
- (a) an estate in fee simple
 - (b) a life estate in the land
 - (c) a perpetual lease of the land granted by the Commonwealth or the State
 - (d) a leasehold interest in the land granted by the Commonwealth or the State that may be converted into an estate in fee simple under the terms of the lease or the Act under which the lease is granted
 - (e) a term lease for pastoral purposes granted under the *Land Act 1994*
 - (f) an interest as purchaser under –
 - (i) a contract for the purchase from the Commonwealth or the State, or any Commonwealth or State instrumentality or authority, of an estate in fee simple in the land by instalments
 - (ii) an instalment contract under the *Property Law Act 1974*, part 6, Division 4, for the purchase of an estate in fee simple in the land
 - (g) a licence or right of occupancy granted by the Commonwealth or the State, or any Commonwealth or State instrumentality or authority, that gives, in the *Commissioner's* opinion, the licensee or the holder of the right reasonable security of tenure
 - (h) an interest in a company's shares if the *Commissioner* is satisfied that –
 - (i) the interest entitles the holder of the interest to exclusive occupation of a specified *home* owned by the company, and
 - (ii) the value of the shares is not less than the value of the company's interest in the *home*.
 - (i) an interest declared under a regulation to be a relevant interest.
- Residential property** – Land in Australia on which there is a *home* which is lawfully occupied or suitable for occupation. This includes houses, townhouse, units, flats, duplexes, converted buildings and fixed moveable dwellings.
- Refer to OSR website for further information.*
- Spouse/de facto partner** – A person is a spouse/de facto partner of another if they are legally married to each other or if they have been living together as a couple on a genuine domestic basis for at least two years, regardless of gender.
- Title search** – A search on the land, upon which the home is built, which shows the name(s) of the registered *owner(s)* of that land. A title search can be obtained from your conveyancer or alternatively, visit the website for the Department of Environment and Resource Management at www.derm.qld.gov.au
- Unencumbered value** – The unencumbered value of *property* is the value of the *property* determined without regard to—
- (a) any encumbrance to which the *property* is subject, whether contingently or otherwise; or
 - (b) any arrangement—
 - (i) the parties to which are not dealing with each other at arm's length; and
 - (ii) that results in the reduction of the value of the *property*; or
 - (c) any arrangement for which a significant purpose of any party to the arrangement was, in the commissioner's opinion, the reduction of the value of the *property*.

Guide to Completing the Application

The First Home Owner Grant Application form has seven sections. These sections must be completed as follows:

Section 1 – Eligibility criteria

Answer Questions 1 to 7 by ticking 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* in the *home*, and any *spouse/de facto partner* of these persons, must be considered when answering these questions.

In exceptional circumstances, the *Commissioner* may use discretion in relation to some 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 *home* must be included.

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/de facto partner*, there are two options. If your *spouse/de facto partner* is an *applicant*, they must be recorded within this section. If your *spouse/de facto partner* is not an *applicant*, that is, they will not have a *relevant interest* in the *property*, 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/de facto partner details

This section must be completed by the *applicant* in relation to the *spouse/de facto partner* of the *applicant* who has not already been specified as an *applicant* (and therefore will not have a *relevant interest* in the *home*). If this section is required to be completed the *spouse/de facto partner* must complete the declaration in Section 7.

Section 4 – Property and Transaction details

Provide the current title (lot and registered plan number) details of the *home*. These details can be obtained from the registered Transfer, a *title search*, the *contract of sale* or *contract to build*.

Provide the expected date of occupancy as *owner* of the *home*. Estimate this date if you are unsure. To be eligible for the grant all *applicants* 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*.

Provide the *unencumbered value* of the *property* if you are acquiring the *home* from a *related person* 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 (not type), 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 must have read and understood all the details completed on the application form.

Section 7 – Declaration by spouse/de facto partner

If an *applicant's spouse/de facto 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.

Supporting documentation checklist

Please supply the required documents with your application and tick off the documents attached. Failure to produce the relevant documentation may result in delays in processing.

Penalties

OSR, as part of its role in administering the *First Home Owner Grant Act 2000*, conducts ongoing 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 may be imposed. The amount of any penalty which may apply is dependant on the circumstances of each case and is in addition to having to repay the grant. In some circumstances the penalty applied is equal to the amount of the grant received.

Providing incorrect or misleading information in this application

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

All applications undergo a rigorous review where applicants are checked for former home ownership in Queensland and interstate. Other checks into spouse/de facto partner status, council records, title details and finance particulars are undertaken on a routine basis.

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 tick [✓] the appropriate boxes.

| OFFICE USE ONLY | |
|-------------------------|--|
| UIN | |
| Application reference | |
| Application received by | |
| Date lodged | |

Section 1 Eligibility criteria

- Note:**
- Eligibility is determined on the date the *Commissioner* receives a completed application together with all required supporting documentation as outlined on page 15.
 - All *applicants* and their *spouse/de facto partner* must be considered when answering eligibility questions.

Eligibility checklist

| | | |
|---|------------------------------|-----------------------------|
| 1. Is this the first time each applicant and/or their <i>spouse/de facto 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 applicant and their <i>spouse/de facto 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: <i>Applicants</i> are not eligible for a grant if they or their <i>spouse/de facto 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 applicant and their <i>spouse/de facto partner</i> a person who has never occupied a <i>residential property</i> 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 applicant a <i>natural person</i> (e.g. not a company) and at least 18 years of age? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Is at least one applicant a <i>permanent resident</i> or Australian citizen? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 6. Will all <i>applicants</i> be occupying the <i>home</i> as their <i>principal place of residence</i> for a continuous period of 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 <i>applicant</i> on or after 1 July 2000 , either: <ul style="list-style-type: none"> ■ entered into a contract for the purchase of a <i>home</i> in Queensland OR ■ entered into a contract to have a <i>home</i> built in Queensland OR ■ in the case of an <i>owner builder</i>, commenced construction of a <i>home</i> in Queensland? (ie laying of foundations) | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

Determination of eligibility

If you have 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:**
- It is essential that **ALL applicants** 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(s)* at Section 6

Number of applicants

How many people will have a *relevant interest* in the *home*?

Disqualifying Arrangements

| | | |
|---|------------------------------|-----------------------------|
| 1. Is the <i>home</i> being purchased from, or built by a <i>related person</i> ? | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 2. Is the <i>consideration</i> for the <i>home</i> less than the market value of the <i>home</i> ? Note: If YES please lodge evidence of value/valuation of the <i>home</i> . | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 3. Have any of the <i>applicants</i> received, or will they receive, <i>financial help</i> (whether directly or indirectly) to assist with the transaction to which this application relates? Note: If NO also select NO for questions 4 and 5. If YES you must lodge a statutory declaration from each applicant setting out a comprehensive description of the financial help received or expected to be received, including details relating to monetary amounts owing or gifted. If the financial arrangement is in writing (i.e. a loan agreement or deed), a copy of that document must be lodged. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 4. Is the person or persons providing the <i>financial help</i> a <i>related person</i> to any of the <i>applicants</i> ? Note: If NO also select NO for question 5. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| 5. Will the <i>related person(s)</i> providing <i>financial help</i> live in or use the <i>home</i> frequently or otherwise to a significant extent? Note: If YES you must lodge a statutory declaration from each applicant outlining the family reasons why the related person will be residing in, or using, the home frequently or to a significant extent. | <input type="checkbox"/> Yes | <input type="checkbox"/> No |

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"/> | <input type="text"/> |
| | Middle name(s) <input type="text"/> | <input type="text"/> |
| | Family name <input type="text"/> | <input type="text"/> |
| Date of birth | <input type="text"/> 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 | <input type="text"/> 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"/> |
| 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"/> |
| | <input type="text"/> | <input type="text"/> |
| Daytime telephone number | <input type="text"/> | <input type="text"/> |

| | | | | |
|---|--|---|--|--|
| Email address | <input type="text"/> | <input type="text"/> | | |
| Current residential address | Unit/Street no. | Unit/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 <i>spouse/de facto partner</i> ? | <input type="checkbox"/> Yes | <input type="checkbox"/> No | <input type="checkbox"/> Yes | <input type="checkbox"/> No |
| | <input type="checkbox"/> Yes – your <i>spouse/de facto partner</i> must complete the details in <i>Applicant 2</i> above | <input type="checkbox"/> No – your <i>spouse/de facto partner</i> must complete Section 3 – <i>Spouse/partner</i> details above | <input type="checkbox"/> Yes – your <i>spouse/de facto partner</i> must complete the details in <i>Applicant 1</i> above | <input type="checkbox"/> No – your <i>spouse/de facto partner</i> must complete Section 3 – <i>Spouse/de facto partner</i> details |

Section 3 *Spouse/de facto partner* details

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

| | <i>Spouse/de facto partner of applicant 1</i> | <i>Spouse/de facto partner of applicant 2</i> |
|---|---|---|
| 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 | First name |
| | Middle name(s) | Middle name(s) |
| | Family name | Family name |
| Date of birth | <input type="text"/> 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 | <input type="text"/> 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"/> |
| | Country | <input type="text"/> |
| Has your <i>spouse/de facto 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="text"/> | <input type="text"/> |
| Daytime telephone number | () <input type="text"/> | () <input 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 | Postcode |

Date when occupation as a *principal place of residence* commenced or is intended to commence (if not known estimate)

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

Title details

| | | | |
|---------|------------|-------------|--------------------------------|
| Lot no. | Plan type* | Plan number | Title reference (if available) |
|---------|------------|-------------|--------------------------------|

* e.g. **SP** for Survey Plan, or **RP** for Registered Plan

Transaction details

What type of transaction does this application refer to:

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

Purchase or construction price

| |
|----|
| \$ |
|----|

Unencumbered value (compulsory for (i) *contracts to build*; (ii) *owner builders*; and (iii) *contracts of sale* if the purchase is between related persons)

| |
|----|
| \$ |
|----|

Date of contract of sale or contract to build

(or if *owner builder*, date the foundations were laid)

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

Date of settlement

(or if building, date of *completion of eligible transaction*)

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

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

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

 (Enter settlement, completion or first draw down date only)

Section 5 Payment details

- Note:**
- If applying to *OSR*, the grant will be paid by electronic funds transfer into the account nominated below.
 - If you are applying to an *Approved Agent*, please **DO NOT** complete the account details below as the grant will be paid through the *Approved Agent*.

Name of financial institution and branch

| |
|--|
| |
|--|

Account name (eg John & Jan Citizen)

| |
|--|
| |
|--|

BSB number (must have six numbers)*

| | | | | | |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|
| <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> | <input type="text"/> |
|----------------------|----------------------|----------------------|----------------------|----------------------|----------------------|

Account number (maximum of nine 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"/> | <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 **before 1 July 2000**.
- I declare that I have not owned and occupied *residential property* within Australia in which I acquired a *relevant interest* on or **after 1 July 2000**.
- I declare that at the date of completion of this application that at **least one applicant** for the grant is a **permanent resident or an Australian citizen**.
- I will be residing in the *home*, that is the subject of this application, as my *principal place of residence* for a **continuous period of 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 *relevant date*.
- 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 on or in connection with this application for the grant.
- I authorise *OSR* to deposit the grant into the account nominated in Section 5 or into the *Approved Agent's* nominated account when lodged with the *Approved Agent*.
- I declare that I will notify the *Commissioner* and repay the grant within 28 days if, upon *completion of the eligible transaction*, the *cap value* of my *home* is greater than or equal to the *cap amount* (see Terms Used).

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

| | <i>Applicant 1</i> | <i>Applicant 2</i> | | | | | | | | | | | | | | | | |
|-----------------------------------|---|----------------------|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|---|
| Name | <input type="text"/> | <input type="text"/> | | | | | | | | | | | | | | | | |
| Signature | <input type="text"/> | <input type="text"/> | | | | | | | | | | | | | | | | |
| Date | <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>2</td><td>0</td><td>Y</td><td>Y</td> </tr> </table> | D | D | M | M | 2 | 0 | Y | Y | <table border="1"> <tr> <td>D</td><td>D</td><td>M</td><td>M</td><td>2</td><td>0</td><td>Y</td><td>Y</td> </tr> </table> | D | D | M | M | 2 | 0 | Y | Y |
| D | D | M | M | 2 | 0 | Y | Y | | | | | | | | | | | |
| D | D | M | M | 2 | 0 | Y | Y | | | | | | | | | | | |
| Before me (signature of witness)* | <input type="text"/> | <input type="text"/> | | | | | | | | | | | | | | | | |
| Full name and address of witness | Name | Name | | | | | | | | | | | | | | | | |
| | Street no | Street no | | | | | | | | | | | | | | | | |
| | Street name | Street name | | | | | | | | | | | | | | | | |
| | Suburb/town | Suburb/town | | | | | | | | | | | | | | | | |
| | State | State | | | | | | | | | | | | | | | | |
| | Postcode | Postcode | | | | | | | | | | | | | | | | |

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

Section 7 Declaration by spouse/de facto partner

1. I declare that the *spouse/de facto partner* details in Section 3, in so far as they relate to me, are true and correct.
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 *residential property* within Australia **before 1 July 2000**.
4. I declare that I have **not owned and occupied** *residential property* within Australia in which I held a *relevant interest* **on or after 1 July 2000**.
5. 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.
6. 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/de facto partner of applicant 1 | Spouse/de facto partner of applicant 2 |
|-----------------------------------|--|--|
| Name | | |
| Signature | | |
| Date | D D M M 2 0 Y Y | D D M M 2 0 Y Y |
| Before me (signature of witness)* | | |
| Full name and address of witness | Name | Name |
| | Street no | Street no |
| | Street name | Street name |
| | Suburb/town | Suburb/town |
| | State Postcode | State Postcode |

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

The Office of State Revenue is collecting the information on this form for the purposes of administering State revenue. Collection of this information is authorised by the *First Home Owner Grant Act 2000*. The information contained in or with this form may be handled by an agency engaged by the Queensland Treasury and/or Office of State Revenue to carry out its functions and activities. Your personal information will not be disclosed without your consent except in the circumstances outlined in the *First Home Owner Grant Act 2000* or as otherwise authorised by law.

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

(Please include a number in the relevant)

How many *applicants* and/or their spouses are of Aboriginal or Torres Strait Islander origin?

Aboriginal

(Note: In this context, Aboriginal means a person of the Aboriginal race of Australia)

Torres Strait Islander

(Note: In this context, Torres Strait Islander means a descendant or a traditional inhabitant of the Torres Strait Islands)

This information is being collected by the Office of State Revenue on behalf of the Australian Productivity Commission for statistical purposes.

Supporting Documentation Checklist

Note:

- To ensure your application is processed in a timely manner, make sure the application is fully completed, signed and dated, and that all necessary documentation is attached.
- Please complete the checklist to ensure you have attached the required supporting documentation defined in the lodgement guide.
- Additional documents may be requested after lodgement of your application.

| Supporting documentation checklist | Applicant to tick if attached |
|--|-------------------------------|
| <p>Note: Refer to the lodgement guide for the documentation required. If you are unable to provide the documents listed below, please contact <i>OSR</i> to discuss your circumstances. Do NOT send original documents, only send copies.</p> | |
| <p>Proof of identity of all applicants and their spouse/de facto partner</p> | |
| Category 1 type of doc. submitted _____ | <input type="checkbox"/> |
| Category 2* type of doc. submitted _____ | <input type="checkbox"/> |
| Category 3* type of doc. submitted _____ | <input type="checkbox"/> |
| Category 4* type of doc. submitted _____ | <input type="checkbox"/> |
| <p>Additional supporting evidence (if applicable)</p> | |
| ■ A marriage or divorce certificate, death certificate or deed poll | <input type="checkbox"/> |
| ■ a statutory declaration for those who are separated | <input type="checkbox"/> |
| ■ a statutory declaration outlining all names you are, or have been, known by | <input type="checkbox"/> |
| <p>Transaction type</p> | |
| <p>Contract of sale to purchase a home:</p> | |
| ■ a copy of your contract of sale, dated and signed by the vendor(s) and <i>applicant(s)</i> (including any special conditions or annexures) | <input type="checkbox"/> |
| ■ a registration confirmation statement or current <i>title search</i> issued by the Department of Environment and Resource Management showing the <i>applicant(s)</i> as the registered <i>owner(s)*</i> | <input type="checkbox"/> |
| <p>Where there is no written contract, or the sale of the home is between family members or related persons:</p> | |
| ■ a copy of the stamped Transfer | <input type="checkbox"/> |
| ■ a registration confirmation statement or current <i>title search</i> issued by the Department of Environment and Resource Management showing the <i>applicant(s)</i> as the registered <i>owner(s)*</i> | <input type="checkbox"/> |
| ■ copies of evidence that <i>consideration</i> has been paid by the <i>applicant(s)</i> and received by, or on behalf of, the vendor(s)* | <input type="checkbox"/> |
| ■ an independent third party valuation or market appraisal of the <i>home</i> dated within 12 months of the date the application for the grant is lodged | <input type="checkbox"/> |
| <p>Contract to build a home:</p> | |
| ■ a copy of your <i>contract to build</i> , dated and signed by the builder and <i>applicant(s)</i> | <input type="checkbox"/> |
| ■ a registration confirmation statement or current <i>title search</i> issued by the Department of Environment and Resource Management showing the <i>applicant(s)</i> as the registered <i>owner(s)*</i> | <input type="checkbox"/> |
| ■ a copy of the final inspection certificate issued by your local council or building certifier* and a copy of one of the following dated no more than 12 months from the date of the <i>contract to build</i> : | <input type="checkbox"/> |
| ■ an independent third party valuation or market appraisal of the <i>unencumbered value</i> of the land | <input type="checkbox"/> |
| ■ a rates notice issued by the relevant local council (if the <i>unencumbered value</i> of the land is displayed) | <input type="checkbox"/> |
| ■ a stamped contract to purchase the vacant land (if the dutiable value is displayed) | <input type="checkbox"/> |
| ■ stamped Form 1 Transfer for the vacant land (if the dutiable value is displayed) | <input type="checkbox"/> |
| <p>Owner builders:</p> | |
| ■ a registration confirmation statement or current <i>title search</i> issued by the Department of Environment and Resource Management showing the <i>applicant(s)</i> as the registered <i>owner(s)</i> of the land on which the <i>home</i> is built | <input type="checkbox"/> |
| ■ a copy of the first inspection report for the laying of foundations issued by your local council or building certifier | <input type="checkbox"/> |
| ■ a copy of the final inspection certificate issued by your local council or building certifier | <input type="checkbox"/> |
| ■ copies of receipts for costs incurred for the construction of the <i>home</i> equal to or more than the grant payable | <input type="checkbox"/> |
| ■ an independent third party valuation or market appraisal of the <i>home</i> dated on or after <i>completion of the eligible transaction</i> | <input type="checkbox"/> |
| <p>* Not Required if your application is lodged with an Approved Agent</p> | |

How to lodge this application

- For payment to be available at settlement or first draw down/progress payment, lodge with the *Approved Agent* who is processing your mortgage
- For payment after *completion of the eligible transaction*, lodge in person or by mail to *OSR*

Note: Read more details about *Approved Agents* at www.osr.qld.gov.au or by phoning the number below.

Contact details

Office of State Revenue
GPO Box 953
Brisbane Qld 4001

Client Contact Centre: 1300 300 734

Visit our website at www.osr.qld.gov.au for service centre locations and to obtain public rulings, information and approved forms relating to this and other State taxation subjects

Please visit:

http://www.qld.gov.au/other_languages/index.html for assistance in a language other than English.

The Office of State Revenue is collecting the information on this form for the purposes of administering State revenue. Collection of this information is authorised by the *First Home Owner Grant Act 2000*. The information contained in or with this form may be handled by an agency engaged by the Queensland Treasury and/or Office of State Revenue to carry out its functions and activities. Your personal information will not be disclosed without your consent except in the circumstances outlined in the *First Home Owner Grant Act 2000* or as otherwise authorised by law.