

**Village of Lincolnwood
2015 Utility Tax Rebate Application
For Fixed-Income and Low-Income Residents**

Who is eligible?

All Lincolnwood residents that paid utility or telecommunications taxes for their Lincolnwood residence in 2015 and who meet the income limits. There is no age requirement. See the appended attachment to define **INCOME**.

What are the income limits?

For single tax return filers, total income of less than \$27,610.00 or for joint filers, total income less than \$36,635.00. Total income is found on IRS form 1040 as the sum of lines 7 thru 14,15a,16a,17 thru 19, 20a and 21 or on form 1040A as the sum of lines 7, 8a, 8b, 9, 10a, 11a, 12 and 13a, or on form 1040EZ line 4 and for residents age 65 or older on Illinois Benefit Access Application (formerly IL 1363) for Circuit Breaker.

Which taxes are subject to rebates?

The municipal utility taxes and telecommunications taxes found on your electric, natural gas, and telephone bills. They are usually labeled as "City" or "Municipal" tax and are grouped with other taxes on the bill. The Village of Lincolnwood **will rebate only the 5%** municipal tax, not any state or federal taxes, or utility company imposed fees or service charges.

I think I'm eligible, how can I request a rebate?

Insert the information in the box below and attach a copy of your US 1040, IL Benefit Access Application(formerly IL 1363) if filed, and Social Security 1099 forms. Please provide copies of utility bills and return to Village Hall.

1. List your total **INCOME** from your 1040, 1040A, or 1040EZ, include Social Security 1099 income (even if not taxable). \$ _____

2. Is your **HOUSEHOLD INCOME** less than \$27,610.00 for single filers, or \$36,635.00 for joint filers? YES _____ NO _____

If your answer to 2 is YES, fill in the amount you paid in municipal taxes each month, for each utility. The Village of Lincolnwood will calculate the 5% and make an adjustment. **Attach a copy of your Federal tax return, Social Security 1099, IL-Benefit Access Application and copies of all utility bills which are REQUIRED as verification.** If your answer was NO, **DO NOT** complete the rest of this form. You are ineligible for the rebate. We reserve the right to examine your Utility Bills if we determine that there may a discrepancy.

MONTH	ELECTRIC	GAS	TELEPHONE
January	\$	\$	\$
February	\$	\$	\$
March	\$	\$	\$
April	\$	\$	\$
May	\$	\$	\$
June	\$	\$	\$
July	\$	\$	\$
August	\$	\$	\$
September	\$	\$	\$
October	\$	\$	\$
November	\$	\$	\$
December	\$	\$	\$
TOTAL	\$	\$	\$

NAME _____ ADDRESS _____

PHONE _____ SOCIAL SECURITY # _____

DATE OF BIRTH _____

SIGNATURE _____ DATE _____

What is considered income?

Income is your 2015 adjusted gross income for federal income tax purposes, plus certain items that may not have been included in this calculation. Unless indicated otherwise, the following items are considered income, even if a particular listing is not taxable by IRS under Federal law:

- Alimony received
- **Annuity benefits**
- Black Lung benefits
- Business income
- Capital gains
- Cash gains
- **Cash assistance from Illinois Department of Human Services and other governmental cash public assistance**
- Cash winnings from such sources as raffles, lotteries, or gambling
- Civil Service benefits
- Damages awarded in a lawsuit, unless suit is for physical injury or sickness
- **Dividends**
- Farm income
- Interest
- Interest on life insurance policies
- Lump sum Social Security payments
- Miscellaneous sources, such as rummage sales, recycling aluminum or baby sitting
- Monthly insurance benefits
- Pension and IRA benefits
- Qualified long term care insurance contract payments
- **Railroad Retirement benefits** (without subtracting any Medicare deductions)
- **Rental income**
- Illinois Cares RX rebate received in 2015
- **Social Security Income** (without subtracting any Medicare deductions)
- **Supplemental Security Income**
- State income tax refunds received in 2015 (only if you took an itemized deduction on your 2015 federal income tax return)
- **Unemployment compensation**
- Veterans' benefits (only the federally taxable portion)
- **Wages, salaries, and tips from work**
- **Workers' Compensation Act Income**
- **Workers' Occupational Diseases Act Income**