

First Home Owner Grant

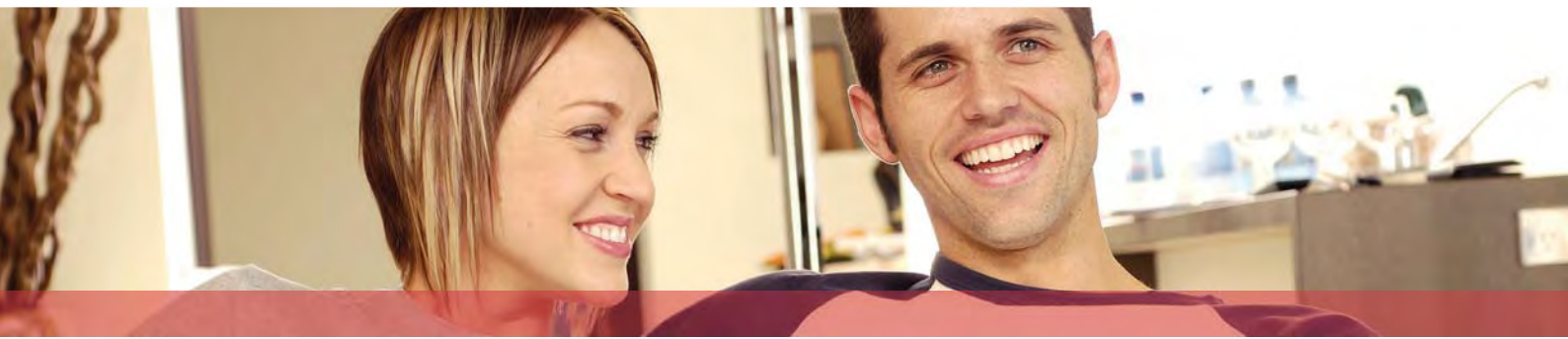
# Application Form and Lodgement Guide



*your first home*

Please read the 'Terms used' for explanations in completing the application  
Please remove application form and retain lodgement guide for your reference  
This form applies for applications lodged on or after 1 July 2007

# 4 easy steps to claim your grant



01

## Read lodgement guide

Important information to read before completing and submitting your application

02

## Detach and complete application form

Complete all relevant sections

03

## Supply all supporting evidence

Please complete the checklist to ensure all required supporting documentation is attached

04

## Lodge application

Submit to your approved agent or the SRO

# Lodgement guide

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

Words shown in *italics* are explained on pages 8 and 9 (Terms used)

## To apply

### Applicants must:

- fully complete the application form and lodge with all relevant supporting documentation
- be a *natural person* (i.e. not applying as a company or trust), at least 18 years of age at the date of settlement or completion of construction
- ensure at least one *applicant* is an Australian citizen or a *permanent resident* at the date of settlement or completion of construction
- be buying or building a *home* for which the contract was signed on or after 1 July 2000, or building a *home* as an *owner builder* where building commenced on or after 1 July 2000
- ensure each person holding a *relevant interest* in the property is an *applicant*
- ensure at least one *applicant* 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*
- lodge an application within 12 months of *completion of the eligible transaction*

### Applicants and their spouse/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
- have previously owned or held a *relevant interest* in a *residential property* anywhere in Australia prior to 1 July 2000
- have occupied, for a continuous period of at least six months, a *residential property* in which they acquired a *relevant interest* on or after 1 July 2000 anywhere in Australia

## How to lodge your application

### You can lodge your application with:

#### ■ the *approved agent* who is providing your finance

A list of *approved agents* can be found at [www.sro.vic.gov.au](http://www.sro.vic.gov.au)

If you require the grant for settlement or first draw down/progress payment, you must lodge your application with an *approved agent*.

#### ■ the State Revenue Office (SRO)

Refer to back page for address details.

**NOTE:** Applications cannot be lodged with the SRO until after the *completion of the eligible transaction*.

# Supporting evidence



## If lodging with an approved agent

Provide a Category 1 document for each *applicant* and their *spouse/partner*. The 100 point check conducted by the *approved agent* will meet the remaining Proof of Identity categories.

(For additional supporting evidence requirements refer to pages 3, 4 and 5)

## If lodging with the SRO

The following evidence **must** be submitted with your application:

### Proof of identity

Each *applicant* and their *spouse/partner* must provide a document from each of the four categories (i.e. **four documents per person**). A single document cannot be used for more than one category.

Preferred documents are shown on pages 2 and 3.

If you are unable to provide the preferred documents, please contact the SRO to discuss your circumstances. Refer to back page for contact details.

Do not send original documents. Only send **certified copies** (for persons who can certify copies refer to 'Terms used' on pages 8 and 9).

### Category 1

Primary identity document and evidence of citizenship or permanent residency (provide one document)

If an Australian citizen:

- Australian birth certificate issued by Registry of Births, Deaths and Marriages
- Australian passport
- Citizenship certificate

If a citizen of another country:

- Current passport
- Evidence of permanent residency or permanent residence visa

If a New Zealand citizen:

- Current passport

NOTE: New Zealand citizens must be living in Australia upon completion of the eligible transaction

NOTE: At least one *applicant* must be an Australian citizen or permanent resident at the date of settlement or completion of construction

# Supporting evidence



## Category 2\*

Linkage between identity and person (photo and signature) (provide one document):

- Australian drivers licence (current)
- Passport (current)
- Firearms licence (current)
- Proof of age issued by Consumer Affairs (photo ID card)

## Category 3\*

Evidence that each applicant and their spouse/partner reside in Australia (provide one document) :

- Medicare card
- Motor vehicle registration
- Centrelink or Department of Veterans Affairs card

## Category 4\*

Evidence of each applicant and their spouse/partner'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

For a complete list of acceptable documents, refer to the First Home Owner Grant Proof of Identity Documents information available at [www.sro.vic.gov.au](http://www.sro.vic.gov.au)

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 divorce certificate
  - Widowed – a *certified copy* of the death certificate of your spouse/partner, or
  - Separated – a statutory declaration with the following information:
    - the name of your former spouse/partner
    - former spouse/partner's date of birth
    - the date you were married or commenced your domestic relationship
    - the date you separated
    - your former spouse/partner's current address (if known), and
    - a statement to the effect that you do not live together and have no intention of resuming cohabitation.

NOTE: Evidence of change of name is required if the name on any of the documents presented is different to the name of the *applicant* (e.g. change of name certificate, statutory declaration)

\* Not required if application is lodged through an *approved agent*

# Supporting evidence



Please provide evidence which relates to the type of transaction you have entered into:

## A Contract to purchase a new, established or off the plan home

- A *certified* copy of the **exchanged** contract of sale, dated and signed by all parties.

- A photocopy of the transfer of land form signed by all parties showing date duty paid or, where the grant is to be offset against the duty payable, the original fully executed transfer of land form\*.

Further supporting evidence is required for the following:

### Purchasing from a related or associated party\*

- A photocopy of the stamped transfer of land form with the **Land Registry Victoria registration number**.
- Evidence that the consideration has been paid by the *applicant* (e.g. provide certified copies of bank statements of both the vendor and applicant showing the payment [withdrawal and deposit of purchase money] at settlement and any loan agreement).

### Nominee purchaser where you are a related or associated party to the named purchaser in the contract\*

- Evidence that the consideration has been paid by the *applicant* (e.g. provide certified copies of mortgage, loan agreement, bank cheques and bank statements).

### Purchasing from a deceased estate (related)#

- Where you are related to the deceased person or are a beneficiary under the Will of the deceased person provide the following:
  - A *certified* copy of the Will and Grant of Probate
  - A *certified* copy of settlement statement for the estate
  - Evidence of payment of consideration to the estate, and
  - A photocopy of the stamped transfer of land form with the **Land Registry Victoria registration number**.

### Purchasing from a deceased estate (not related)

- Where you are not related to the deceased person and are not a beneficiary under the Will of the deceased person, provide a statutory declaration confirming these details.

\* Not required if application is lodged through an *approved agent*

# Application must be lodged with the SRO

# Supporting evidence



## B Contract to build a home

A certified copy of the:

- Contract to build dated and signed by all parties
- Title search showing the *applicant(s)* as the registered proprietor(s)\*
- Certificate of Occupancy\*.

## C Owner builder

A certified copy of the:

- Evidence of the date for laying of the foundations (e.g. receipt(s), notice of inspection)
- Certificate of Occupancy
- Title search showing the *applicant(s)* as the registered proprietor(s)\*
- Documentary evidence of building costs incurred for the construction of the *home*\*. The evidence submitted must total an amount equal to or greater than the grant and must not include your own labour costs

\* Not required if application is lodged through an approved agent



# When will the grant be paid?



The date the grant is paid depends on whether you are building or buying. It also depends on whether you are applying through an approved agent or the SRO. The following table details the various scenarios.

Type of transaction	Applying through	Payment of grant
Purchase of a new, established or off the plan home	approved agent	at date of settlement by <i>approved agent</i> .
	the SRO	payment will be made to your nominated account by the SRO within 14 days of lodging your application. An application will only be considered after settlement.
Contract to build	approved agent	at date of first progressive payment by <i>approved agent</i> .
	the SRO	payment will be made to your nominated account by the SRO within 14 days of lodging your application. An application will only be considered after issue of the Certificate of Occupancy.
Owner builder	approved agent	on receipt of Certificate of Occupancy by <i>approved agent</i> .
	the SRO	payment will be made to your nominated account by the SRO within 14 days of lodging your application. An application will only be considered after issue of the Certificate of Occupancy.
Terms contract	the SRO	payment will be made to your nominated account by the SRO within 14 days of lodging your application. An application will only be considered after providing evidence of possession.

Payment of the First Home Owner Grant is subject to the written approval being made by the *Commissioner*.

Your application will be returned to you if not fully completed and the required supporting evidence is not attached.

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



- At least one *applicant* 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* (residency requirement).
- It is the responsibility of the *applicant* to satisfy the *Commissioner* that they have met the residency requirement. Applicants may be required to verify this later by providing evidence supporting their period of occupancy.
- Should you not meet the residency requirement, you must notify the SRO in writing within 14 days of the *notifiable event*, and repay the grant.



# Terms used



## Applicant

The 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 the SRO that is authorised to process applications for the First Home Owner Grant.

## Certified copy

A true copy of an original document that has been sighted and certified by an authorised person\* and 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, title, registration number (where applicable) and be signed and dated.

\*An authorised person includes a legal practitioner, Justice of the Peace (JP), Magistrate, notary public, police officer, dentist, veterinary practitioner, pharmacist, Certified Practising Accountant, Member of Parliament, a minister of religion, medical practitioner and officers of the SRO.

## Commencement date of the eligible transaction

Date of contract to purchase or build a *home*, or for an *owner builder* it is the date the foundations commenced being laid.

## Commissioner

Commissioner of State Revenue Victoria.

## Completion of the eligible transaction

When the *applicant* is entitled to possession of the property under the contract, or the building is ready for occupation as a place of residence and (except for *terms contracts* and where a duty off-set is elected) the *applicant* is registered on the Certificate of Title.

## Contract to build

A comprehensive building contract where a builder agrees to build a *home*, from the time the building starts to when it is finished and ready for occupation.

## Consideration

Purchase price or cost of construction of the *home*.

## Eligible transaction

Contract for the purchase of a *home*, *contract to build a home* or construct a *home* as an *owner builder* on or after 1 July 2000.

## Established home

A *home* that has been previously occupied and is lawfully fit for occupation.

## Home

A building, affixed to land, that may be lawfully used as a place of residence and is, in the *Commissioner's* opinion, suitable for use as a place of residence.

## Natural person

A person (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 house and land packages and *off the plan*. (Refer to [www.sro.vic.gov.au](http://www.sro.vic.gov.au) for further information).

## 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 within 14 days** of the event.

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*.

# Terms used



## Off the plan

A contract for the purchase of the *home* on a proposed lot in an unregistered plan of a subdivision of land.

## 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 residency visa under Section 30 of the *Migration Act 1958* (Cth) or a New Zealand citizen who is the holder of a special category visa under Section 32 of the *Migration Act 1958* (Cth).

## Principal place of residence

The *home* you primarily reside in. This *home* must be occupied by an *applicant* for a continuous period of at least six months commencing within 12 months of the *completion of the eligible transaction*.

## Related or associated party

A person is related to or associated with another party when:

- (i) one is the *spouse/partner* of the other, or
- (ii) they are related by blood, marriage or adoption, or
- (iii) they are a shareholder or director of the other party, being a company, or
- (iv) they are a beneficiary of a trust for which the other party is a trustee, or
- (v) the transaction is otherwise not at arm's length.

## Relevant interest

A person with a *relevant interest* may be described as someone who will have a legal entitlement to occupy the *home* being bought or constructed. Usually this will be the person(s) registered as proprietor on the title. This commonly is an estate in fee simple. Other forms of interest are defined in the *First Home Owner Grant Act 2000*. Each person acquiring a *relevant interest* must be an *applicant* on the application form.

## Residential property

Land in Australia on which there is a *home* which is lawfully occupied or suitable for occupation. This includes houses, townhouses, units, flats, duplexes, converted warehouses and fixed moveable homes.

## Spouse/partner

A person is a spouse of another if they are legally married to each other. A person is a partner of another if they are in a domestic relationship regardless of gender.

## SRO

State Revenue Office of Victoria.

## Terms contract

A contract of sale where the purchaser has to make two or more payments (excluding the deposit) to the vendor after the contract is signed by all parties.

The *applicant* as the purchaser must be in possession under the contract and cannot be registered on title until the final payment is made to the vendor.

## Title search

A search on the land which shows the names of the registered owners. A *title search* can be obtained from the Department of Sustainability and Environment, Land Victoria Office at [www.dse.vic.gov.au](http://www.dse.vic.gov.au)

# Guide to Completing the Application

The First Home Owner Grant application form has 8 sections. These sections must be completed as follows:

## 01 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 meets the eligibility criteria.

All persons with a *relevant interest* (refer to 'Terms used') in the property, and any *spouse/partner* of these persons, must be considered when answering these questions.

In exceptional circumstances, the *Commissioner* may use discretion relating to the eligibility criteria. Please contact the SRO for further information.

All decisions relating to the eligibility of an *applicant* are made by the *Commissioner*.

## 02 Applicant Details

Detail the number of persons with a *relevant interest*. All persons who have, or will have, a *relevant interest* in the property must record their details in this section.

If there are more than two applicants, an additional application will need to be completed and attached.

If an *applicant* has a *spouse/partner*, there are two options. If your *spouse/partner* is an *applicant*, they must complete this section. If your *spouse/partner* is not an *applicant*, their details must be recorded within section 3.

Please nominate a postal address for correspondence to be sent on behalf of all applicants.

## 03 Spouse/partner Details

This section must be completed by the *applicant* in relation to their *spouse/partner* who has not already been specified as an *applicant* in section 2. If this section is required to be completed the *spouse/partner* must complete the declaration in section 7.

## 04 Property and Transaction Details

Provide the current title (volume and folio numbers) details of the property. These can be obtained from the transfer of land form, a *title search* or the contract of sale. If unknown, enter the parent title details.

Provide the expected date of occupancy as *owner* of the *home*. Estimate this date if you are unsure. To be eligible for the grant at least one *applicant* must occupy 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*.

## 05 Payment Details

Applicants must complete this section only if applying through the SRO. 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 account. Provide details of the name of financial institution, account name, BSB, and account number. Failure to provide correct details will cause delays in payment of the grant.

## 06 Declaration by Applicant

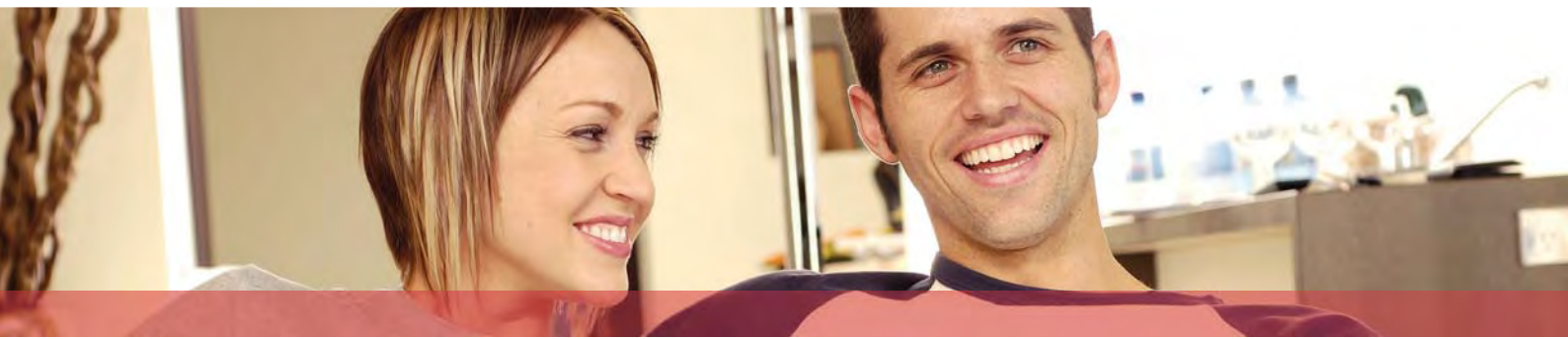
All applicants must read and understand all details on the application form before signing the declaration.

## 07 Declaration by spouse/partner

If an applicant's *spouse/partner* is not an *applicant*, they must read and understand all details on the application form before signing the declaration.

## 08 Supporting Documentation Checklist

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



## Penalties

The SRO, 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 residency requirement, penalties and interest 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.

## Making a false or misleading statement in or in connection with this application

It is an offence for a person to make a false or misleading statement in or in connection with an application for a grant. If it is determined that a person has made such a statement, then they may be prosecuted.

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

*helping open the door to your first home*

## Further Information

Website [www.sro.vic.gov.au](http://www.sro.vic.gov.au)

Email [sro@sro.vic.gov.au](mailto:sro@sro.vic.gov.au)

Telephone 13 21 61

Fax 03 9628 6851

Mail State Revenue Office Victoria  
GPO Box 1641  
Melbourne Victoria 3001

In Person State Revenue Office Victoria  
Customer Service Centre  
Level 2, 121 Exhibition Street  
Melbourne Victoria 3000  
8.30am – 4.30pm (Monday, Tuesday, Thursday and Friday)  
8.30am – 1.00pm (Wednesday)

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Help in community languages is available