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CITY OF SAN JOSÉ FINANCE DEPARTMENT
REVENUE MANEGEMENT
BUSINESS TAX REFUND/CREDIT REQUEST

City of San Jose Finance Dept.
Revenue Management
200 East Santa Clara St.
San Jose, Ca 95113
Ph 408/535-7055
Fx 408/292-6480
http://www.csjfinance.org

DATE: _____ BUSINESS TAX ACCOUNT #_____

NAME OF BUSINESS_____

BUSINESS ADDRESS _____ Select State _____
(NUMBER/STREET) (CITY) (STATE) (ZIP)

MAILING ADDRESS _____ Select State _____
(NUMBER/STREET) (CITY) (STATE) (ZIP)

Pursuant to the provisions of Chapter 4.76 of the San José Municipal Code, a request is hereby made for a(n) refund/adjustment of the business tax paid/due to the City of San José for the year(s)_____.

REASON FOR REQUEST:

◯ Overpayment

◯ Financial Hardship

Poverty Level: 2016 - $23,760
Sole Proprietor: 1) Owned by one person, husband & wife
2) Corporation owned by one person, husband & wife, domestic partnership
3) Domestic Partnership
Attach a copy of your FEDERAL INCOME TAX FORM 1040 (both sides), all Schedule "C"s and any other applicable schedules for financial hardship.

◯ Other:

AFFIDAVITS & DOCUMENTS REQUIRED AS PROOF OF THE CLAIM MUST BE ATTACHED.

FOR REFUND: Original Business Tax Certificate OR Receipt must be attached for refund. There is a **$15.00** processing fee for the issuance of refund checks. (SJMC 4.76.340C)

Make **REFUND CHECK** Payable to: _____

I DECLARE, UNDER PENALTY OF PERJURY, THAT THE ABOVE STATEMENTS ARE TRUE.

_____ _____ _____
SIGNATURE DATE TELEPHONE

REVENUE MANAGEMENT DIVISION USE ONLY

Tax Year _____

Business Tax (001-42000000-7418
Tax Amount _____ Date paid _____

P/I (001-42000000-3190)
Amount _____ Date paid _____

State Fee (001-42000000-7055)
Amount _____ Date paid _____

BID: DT __ (351-41000000-7502) JT __ (351-41000000-7504)
Amount _____ Date paid _____

Amount Refundable _____

Less processing fee(s)

Exemption (001-42000000-3504)
Amount _____

Refund (001-42000000-3503)
Amount _____

Total Refund _____

Investigated by _____Date_____ ◯ Approved ◯ Denied
Supervisor _____ Date_____
APPROVED BY _____ Date_____
Deputy Director of Finance, Treasury

Rev 5/2016

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