



Office of State Revenue
NSW TREASURY
ABN: 77 456 270 638

Application Form and Lodgment Guide

- NOTE: ■ Read Section 8 for explanations of the terms used in this application
 ■ Before lodging remove pages 1 and 2 and keep for your reference

Lodgment Guide

To apply:

■ Applicants must:

- Fully complete the application form and lodge with all relevant supporting documentation
- Be a natural person, at least 16 years of age (ie. not applying as a company or trust)
- Be an Australian citizen or permanent resident or be applying with a person who is
- 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 an applicant will occupy the home as their principal place of residence for a **continuous period of 6 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 (including a de facto partner) must:

- Not have previously received a First Home Owner Grant in any State or Territory of Australia
- Not have **owned** a residential property anywhere in Australia **prior** to 1 July 2000
- Not have **owned and occupied** a residential property anywhere in Australia **after** 1 July 2000

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.osr.nsw.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 your **approved agent**
- the Office of State Revenue (OSR) ➤ *Go to page 12 for addresses*

NOTE: Applications cannot be lodged with OSR until the eligible transaction has been completed

➤ See Section 8 for meaning of 'completion of the eligible transaction'

Supporting evidence

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

1 Proof of identity

- A certified copy of an Australian birth certificate or birth extract for every applicant and their spouse who were born in Australia
- For applicants and their spouse not born in Australia, a certified copy of their birth certificate or Australian citizenship or passport

NOTE: You must provide a certified copy of documentary evidence of Permanent Residency or Citizenship of Australia for at least **one** 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 divorce certificate(s)
 - Widowed - a certified copy of the death certificate of your spouse
 - Separated - a statutory declaration with the following information:
 - the name of your spouse
 - spouse's date of birth
 - the date you were married
 - the date you separated
 - your spouse's current address (if known)
 - a statement to the effect that you do not live together and have no intention of resuming cohabitation

If you have: ■ Changed your name - a certified copy of the change of name certificate (eg. Deed poll)

2 Transaction type

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

A Contract to purchase a new or established home or an 'off the plan' home

A certified copy of the **exchanged** Contract for Sale, dated and signed by the vendor and **one** of the following:

- a copy of your transfer lodged with the Land and Property Information NSW office showing the dealing number*; or
- a Title Search showing the applicant(s) as the registered proprietor(s)*

Where there is **no contract** or the transaction is between family members or **related parties**, you will also need to supply **all** of the following:

- a copy of your stamped and dated transfer signed by all parties
- a Title Search showing the applicant(s) as the registered proprietor(s)* and
- evidence that the consideration has been paid*

OR

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)*
- Occupation Certificate issued by your local Council or a Final Inspection Certificate*

OR

C Owner builders

A certified copy of:

- the Owner Builder permit issued by the Office of Fair Trading
- the approval from Council for the laying of the foundations
- the Occupation Certificate issued by Council or a Final Inspection Certificate
- documentary proof of building costs incurred for the construction of the home*
- the Title Search showing the applicant(s) as the registered proprietor(s)*

The proof submitted must total an amount equal to or greater than the grant and must not include your own labour costs

* **Not required if the application is lodged with an approved agent**

NOTE: Do not post original documents to OSR, please provide certified copies only. Copies may only be certified by a Solicitor, Justice of the Peace (JP) and officers of OSR or approved agents

When will the grant be paid?

Applications lodged with an approved agent

Where you:

- are purchasing an **established home, new home** or **'off the plan' home**, your grant can be made available at settlement
- have a **contract to build** with a registered builder, your grant will be paid when the foundations are laid and your builder issues your first progress payment invoice (not the deposit)
- are an **owner builder**, the grant will be paid when the local Council has determined that the house is ready for occupation

Applications lodged with OSR

Where you:

- are purchasing an **established home, new home** or **'off the plan' home**, your grant will be paid when your name is registered on the Certificate of Title (except for Terms Contracts which can be paid upon possession)
- have a **contract to build** with a registered builder or are building a home as an **owner builder**, the grant will be paid when your name is registered on the Certificate of Title **and** the local Council has determined that the house is ready for occupation

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 **6 continuous months** commencing **within** 12 months of completion of the eligible transaction

It is the responsibility of the applicant to satisfy the Chief Commissioner that they have met the residency requirement

Should you move out of the home or sell it after a period of less than 6 months, you **must** write to OSR to determine whether you have satisfied the residency requirement



Office of State Revenue
NSW TREASURY

ABN: 77 456 270 638

First Home Owner Grant Act 2000

OFH 001 – 07/04

Application for First Home Owner Grant

Office use only

UIN

Application reference

Application received by

Date lodged

- NOTE:
- This application will not be accepted unless it is fully completed, signed in blue or black ink and all required supporting evidence is lodged
 - Read Section 8 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
 - Please answer all questions and tick the appropriate boxes

Section 1 Eligibility criteria

- NOTE:
- Eligibility is determined at the date of lodgment of this application
 - All applicants and their spouses (including de facto partners) must be considered when answering eligibility questions

Eligibility checklist

1	Does each applicant and their spouse declare that they have not received 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	Does each applicant and their spouse declare that they have never held a relevant interest in a residential property before 1 July 2000 in any State or Territory of Australia? NOTE: Applicants and/or their spouse who have held a relevant interest in a residential property prior to 1 July 2000 are not eligible for the grant, even if they have never occupied the property	<input type="checkbox"/> Yes <input type="checkbox"/> No
3	Does each applicant and their spouse declare that they have never occupied a residential property in which they held a relevant interest on or after 1 July 2000 in any State or Territory of Australia?	<input type="checkbox"/> Yes <input type="checkbox"/> No
4	Is every applicant a natural person at least 16 years of age (ie not a company or trust)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
5	Is at least one applicant a permanent resident or Australian citizen?	<input type="checkbox"/> Yes <input type="checkbox"/> No
6	Will at least one applicant be occupying the home as their principal place of residence for a continuous period of 6 months commencing within 12 months of completion of the eligible transaction?	<input type="checkbox"/> Yes <input type="checkbox"/> No
7	Has each applicant on or after 1 July 2000 , either: <ul style="list-style-type: none"> ■ entered into a contract for the purchase of a home in New South Wales OR ■ entered into a contract to have a home built in New South Wales OR ■ in the case of an owner builder, commenced construction of a home in New South Wales? (ie laying of foundations) 	<input type="checkbox"/> Yes <input type="checkbox"/> No

Determination of eligibility

If you 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 Chief Commissioner of State Revenue

Please attach additional information (where applicable) to support your eligibility for the First Home Owner Grant, to Section 9 Additional information on page 10

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

Applicant 1

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"/>																
Provide name on birth certificate (if different from above)	<input type="text"/> First name <input type="text"/> Middle name(s) <input type="text"/> Family name	<input type="text"/> First name <input type="text"/> Middle name(s) <input type="text"/> Family name																
Date of birth	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> D D M M Y Y Y Y	<input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> <input type="text"/> D D M M Y Y Y Y																
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"/>																
Place of birth	State/Territory <input type="text"/> Country <input type="text"/>	<input type="text"/> <input type="text"/>																
Daytime telephone number	(<input type="text"/>) <input type="text"/>	(<input type="text"/>) <input type="text"/>																
Current residential address	<input type="text"/> Street no. <input type="text"/> Street name <input type="text"/> Suburb/town <input type="text"/> State <input type="text"/> Postcode	<input type="text"/> Street no. <input type="text"/> Street name <input type="text"/> Suburb/town <input type="text"/> State <input type="text"/> Postcode																
Address for service of notices (if different from above)	<input type="text"/> <input type="text"/> <input type="text"/> Suburb/town <input type="text"/> State <input type="text"/> Postcode	<input type="text"/> <input type="text"/> <input type="text"/> Suburb/town <input type="text"/> State <input type="text"/> Postcode																
Do you have a spouse? (Spouse includes a de facto partner)	<input type="checkbox"/> Yes <input type="checkbox"/> No	<input type="checkbox"/> Yes <input type="checkbox"/> No																
Will your spouse have a relevant interest in the home?	<input type="checkbox"/> Yes – your spouse must complete the details in Applicant 2 above <input type="checkbox"/> No – you must complete Section 3 – Spouse details	<input type="checkbox"/> Yes – your spouse must complete the details in Applicant 1 above <input type="checkbox"/> No – you must complete Section 3 – Spouse details																
Tick the States and/or Territories in which you have lived	<table border="1"> <tr> <td>ACT</td><td>NSW</td><td>NT</td><td>QLD</td><td>SA</td><td>TAS</td><td>VIC</td><td>WA</td> </tr> </table>	ACT	NSW	NT	QLD	SA	TAS	VIC	WA	<table border="1"> <tr> <td>ACT</td><td>NSW</td><td>NT</td><td>QLD</td><td>SA</td><td>TAS</td><td>VIC</td><td>WA</td> </tr> </table>	ACT	NSW	NT	QLD	SA	TAS	VIC	WA
ACT	NSW	NT	QLD	SA	TAS	VIC	WA											
ACT	NSW	NT	QLD	SA	TAS	VIC	WA											

Number of applicants

How many people will have a relevant interest in the property?

Related party transactions

Are any of the applicants or their spouse related to the vendor or builder?

Yes > *provide evidence of the consideration paid* No

Section 3 Spouse details

- NOTE:
- Spouse includes a de facto partner
 - This schedule must be completed where the spouse of an applicant **has not been specified as an applicant** in Section 2 of the application
 - **Applicant's spouse must sign the Spouse declaration on page 8**

Spouse of applicant 1

Spouse of applicant 2

Title

Mr Mrs Miss Ms Dr

Mr Mrs Miss Ms Dr

First name

Middle name(s)

Family name

Provide name on birth certificate
(if different from above)

First name

Middle name(s)

Family name

First name

Middle name(s)

Family name

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

Has your spouse ever used any
name other than the name(s)
declared above?

Yes – list
name(s) below No

Yes - list
name(s) below No

Daytime telephone number

()

()

Tick the States and/or Territories
in which your spouse has lived

ACT	NSW	NT	QLD	SA	TAS	VC	WA
-----	-----	----	-----	----	-----	----	----

ACT	NSW	NT	QLD	SA	TAS	VC	WA
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Section 4 Property and transaction details

Address of the property

Lot no	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)

				2	0		
D	D	M	M	Y	Y	Y	Y

Purchase or construction price

\$

Title details

Lot no/Section no	Plan no (DP/SP)
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Transaction details

What type of transaction does this application refer to:

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

Approved agent and OSR use only

All evidence sighted Name of person sighting the evidence _____

Payment eligibility date

				2	0		
D	D	M	M	Y	Y	Y	Y

Date of contract (or if 'owner builder' date the foundations were laid)

				2	0		
D	D	M	M	Y	Y	Y	Y

Date of settlement (or if building, date of completion)

NOTE: If lodging with an approved agent please estimate

				2	0		
D	D	M	M	Y	Y	Y	Y

Section 5 Payment details

- NOTE: ■ If applying with OSR, the grant will be paid by electronic funds transfer into the account nominated below
- If you are applying with 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 6 numbers)*

--	--	--	--	--	--

Account number (maximum of 9 numbers)*

--	--	--	--	--	--	--	--	--

* DO NOT include dashes or spaces

Approved agent use only

Applicant reference

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Section 6 Declaration by applicant

- 1 I have completed the application form and attached all relevant documents in support of this application
- 2 I 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
- 3 I declare that I have not **owned** a home or had a relevant interest in a residential property within Australia **prior to 1 July 2000**
- 4 I declare that I have not **owned and occupied** a residential property within Australia in which I held a relevant interest **after 1 July 2000**
- 5 I declare that at the date of lodgment of this application that **at least one applicant** for the grant is a **permanent resident or an Australian citizen**
- 6 An applicant will be residing in the home that is the subject of this application as their principal place of residence for a **continuous period of 6 months** commencing within 12 months of completion of the eligible transaction
- 7 I undertake to notify the Chief Commissioner of State Revenue of any notifiable event relevant to the requirements under the *First Home Owner Grant Act 2000* within 14 days from the occurrence of that notifiable event
- 8 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
- 9 I authorise OSR to access and exchange information about me that may affect my eligibility for the First Home Owner Grant with the approved agent (where applicable) or other Government agencies as permitted by law
- 10 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
- 11 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
- 12 I authorise the approved agent to hold the grant until completion of the eligible transaction and to repay the grant to the Chief Commissioner if the transaction is not completed within 28 days of the date specified
- 13 I authorise the Chief Commissioner to address all correspondence relating to this application to Applicant 1 at the address nominated
- 14 I acknowledge that I may be liable for penalties of up to \$11 000 for making a false or misleading statement on or in connection with this application for the grant

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

	Applicant 1	Applicant 2
Name		
Signature		
Date	2 0	2 0
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

* Not an applicant or spouse of an applicant

Eligible transaction	- Contract for the purchase of a home, contract to build a home or construct a home as an owner builder
Established home	- A home that has been previously occupied and is lawfully fit for occupation
Home	- Is a building, affixed to land, that may be lawfully used as a place of residence and is, in the Chief 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
Notifiable event	- When any part of the eligibility criteria is not met, the applicant(s) must notify the Chief 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
Off the plan	- A contract for the purchase of the home on a proposed lot in an unregistered plan of a subdivision of land
OSR	- The Office of State Revenue, New South Wales
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
Owner	- A person who has a relevant interest in land on which a home is built
Permanent resident	- A person who holds a permanent visa (under Section 30 of the <i>Migration Act 1958</i> of the Commonwealth) or a New Zealand citizen who is the holder of a special category visa (under Section 32 of the <i>Migration Act 1958</i>) and has satisfied the Chief Commissioner that he or she intends to reside permanently in Australia
Principal place of residence	- The home you primarily reside in. This home must be occupied by an applicant for a continuous period of 6 months commencing within 12 months of the completion of the eligible transaction
Relevant interest	- Refers to the means by which a person holds their interest in land on which the home is built. This commonly is an estate in fee simple. Other forms of interest are defined in the <i>First Home Owner Grant Act 2000</i>
Residential property	- Land in Australia on which there is a home which is lawfully occupied or suitable for occupation. These include houses, townhouses, units, flats, duplexes, converted warehouses, fixed transportable and moveable homes
Spouse	- The person to whom the applicant is married or cohabiting with on a genuine domestic basis in a relationship of de facto marriage, (including same sex relationships) as defined in the <i>Property (Relationships) Act 1984</i> NOTE: There is no minimum period of cohabitation which defines a de facto marriage under the <i>Property (Relationships) Act 1984</i>
Terms contract	- A contract for the sale of land where the purchaser has to make 2 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 Land and Property NSW website: www.lpi.nsw.gov.au

Contact details

Office hours Monday to Friday
Phone enquiries: 8.30 am – 5.00 pm
Counter enquiries: 8.30 am – 4.30 pm

Phone

Parramatta/Sydney - 1300 130 624*
Newcastle - 1300 130 624*
Wollongong - 1300 130 624*
*Interstate clients call (02) 9689 6200

Internet

www.osr.nsw.gov.au

Email

first.home.benefits@osr.nsw.gov.au

Postal addresses

Parramatta/Sydney - GPO Box 4042 Sydney NSW 2001
Newcastle - PO Box 511 Newcastle NSW 2300
Wollongong - PO Box 666 Wollongong NSW 2520

Document exchange

- DX 456 Sydney
- DX 7860 Newcastle
- DX 5245 Wollongong

Office locations (counter services only – not postal addresses)

Parramatta - Lang Centre, cnr Hunter & Marsden Streets
Sydney - Level 3, 55 Hunter Street
Newcastle - Level 2, 97 Scott Street
Wollongong - Level 6, 90 Crown Street

Help in community languages is available.

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, lodge in person or by mail to OSR after the property is registered in your name and the home is completed

NOTE: You can get details about approved agents by visiting our website at www.osr.nsw.gov.au or by phoning any of the numbers above.

PRIVACY STATEMENT

The information in this form is required by the Office of State Revenue (OSR) to determine whether or not you meet the criteria for the payment of the First Home Owner Grant. Any information you provide is on a voluntary basis and is needed to process your application for the grant.

The information provided may be disclosed to third parties with your consent or as required or permitted by law. It will also be stored on the First Home Owner Grant Scheme national database and your application will be retained by either OSR or your approved agent.

An individual may review and update personal information held by OSR by contacting the office.