

Application for NSW New Home Grant for Agreements for Sale or Transfers entered into on or after 1 July 2014

- Applies to **new homes** not exceeding **\$650,000** in value
- Applies to **vacant land** not exceeding **\$450,000** in value

Important: Changes to Balance of Grant payments (Where the duty payable is less than \$5,000)

From 1 January 2016, all Balance of Grant payments will be issued to the purchaser(s) by way of an Electronic Funds Transfer (EFT).

The EFT details will be collected as part of this application form. OSR and Electronic Duties Return (EDR) systems will be updated to collect this information from **7 December 2015**.

To ensure that the Balance of Grant payment can be processed, please complete the EFT Details section of this form.

Note:

- For agreements or transfers entered into on or before 30 June 2014, please use form ODA 072B.
- Each purchaser is restricted to one grant each financial year. Where a purchaser receives a grant for an agreement/transfer which occurred in a financial year, the purchaser will not be eligible for a further grant on another agreement/transfer which occurs in that financial year.
- Any reference to a purchaser in this application form includes a transferee.
- This form must be completed by all purchasers.
- Before completing this application, each purchaser should read the NSW New Home Grant Scheme factsheet at www.osr.nsw.gov.au
- An agreement for the sale or transfer of land is eligible for consideration under the scheme only if it is entered into on or after **1 July 2012**.
- Where there is more than one purchaser under the agreement/transfer, each purchaser must complete a separate declaration contained in the application.
- Where the purchaser is a company, the declaration must be completed by a duly authorised officer (director or secretary) of the company.
- Where the purchaser is a trustee, the declaration must be completed by either the trustee, who is a natural person, or where the trustee is a company, by a duly authorised officer of the trustee company.
- Each purchaser must be an Australian citizen, Australian resident or Australia-owned body:

Australian citizen has the same meaning as in the *Australian Citizenship Act 2007 of the Commonwealth*. **You must provide a certified copy of your Australian Birth Certificate, Australian Passport or Australian Citizenship Certificate.**

Australian resident means:

- ▶ The holder of a permanent visa within the meaning of section 30 of the *Migration Act 1958 of the Commonwealth*. **You must provide a certified copy of your Permanent Resident Visa,**
OR
- ▶ A New Zealand citizen who holds a special category visa within section 32 of the *Migration Act 1958 of the Commonwealth*. **You must provide a certified copy of your New Zealand Passport.**

Australia-owned body is a corporation or body corporate that is at least 50 per cent owned or controlled by persons who are Australian citizens or Australian residents.

- Where the purchaser is a trustee, at least 50 per cent of the beneficial interest in the land must be held for the benefit of Australian citizens, Australian residents or Australia-owned bodies.

- Client Identification (CI) is required for all purchasers:
 - ▶ For individuals, you must provide a CI document which provides your date of birth if the above documents do not provide your date of birth.
 - ▶ For companies, you must provide a CI document which provides your ABN/ACN/ARBN.
 For more information, read the Duties Client Identification factsheet at www.osr.nsw.gov.au
- Under the *Taxation Administration Act 1996*, you are required to provide all relevant information to enable duty to be assessed on a document or transaction. It is an offence to provide false or misleading information.
- Print clearly in the boxed spaces and tick the appropriate boxes.

Purchaser details

If an Australian citizen or Australian resident, complete below:

	Purchaser 1	Purchaser 2
Full name		
Date of birth	/ /	/ /
Current residential address		
Address for correspondence (If different from residential address)		
Contact phone number	()	()
Email address		

If an Australian-owned body, complete below:

Company name	
ABN/ACN/ARBN/ORG No.	
Street address	
Address for correspondence (If different from residential address)	
Contact name	
Contact phone number ()	Email address

If purchasing as a trustee, complete below:

Trustee name	
Name of trust or beneficial owner	
Trustee – Date of birth, if a natural person / /	
Trustee – ABN/ACN/ARBN, if a trustee company	
Street address	
Address for correspondence (If different from residential address)	
Contact name	
Contact phone number ()	Email address

If lodged by an agent, complete below:

Name		
Agent no.	DX number	Location
Postal address		
Suburb	State	Postcode
Daytime phone number ()		

Note: You must complete the following sections:

Type of purchase

The purchase is:

- a new home
 an off the plan
 a vacant land.

Transaction details

Date of agreement for sale or transfer / / 20	Dutiable value* \$
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*Dutiable value – the greater of:

- a) the consideration for the dutiable transaction including any GST paid or payable, or
b) the unencumbered value of the dutiable property.

Property details

Plan type*	Plan no.	Sub-folio	Lot no.	Section no.
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*Enter DP for Deposited Plan; SP for Strata Plan; Other if not DP or SP and enter the other details under Plan no.

Unit/Street no.	Street name
Suburb/Town	State NSW Postcode

Declaration by purchaser

I,

do solemnly and sincerely declare that:

1. I am:

- an Australian citizen an Australian resident
 a duly authorised officer of an Australian-owned body that is at least 50 per cent owned or controlled by persons who are Australian citizens, Australian residents or Australian-owned bodies

Name of Australian-owned body

- a trustee (natural person), where at least 50 per cent of the beneficial interest in the land is held by Australian citizens, Australian residents or Australian-owned bodies
 a duly authorised officer of a trustee company, where at least 50 per cent of the beneficial interest in the land is held by Australian citizens, Australian residents or Australian-owned bodies

Name of trustee company

2. the property will only be used for residential purposes
3. this agreement/transfer does not replace any agreement/transfer made before 1 July 2012 which was for the sale or transfer of substantially the same property
4. I have not received the benefit of a grant under the New Home Grant Scheme for any other agreement for sale or transfer entered into in the same financial year as this agreement for sale or transfer
5. I acknowledge that I may be required to pay any duty that is assessed or be liable for penalties and may also be prosecuted for making a false or misleading statement in or in connection with this application
6. where the property is vacant land, I acknowledge that construction of the home must commence within 26 weeks after the agreement is completed
7. where the purchase is an off the plan purchase, it is an agreement for the sale or transfer of land that is intended to be used as the site of a new home, which is to be built before the completion of the agreement
8. the agreement or transfer is not eligible for a duty exemption or concession under the First Home – New Home Scheme (not applicable for company purchasers)
9. I am not eligible for or have at any time been paid a grant under the First Home Owner Grant Scheme (First Home Owner Grant (New Homes) Scheme from 1 October 2012) in respect of this property (not applicable for company purchasers)
10. I undertake to notify the Commissioner of any details that change and affect the determination of this application.

I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the *Oaths Act 1900*

Declared at (Place)

on (Date) / /

Signature of declarant

in the presence of an authorised witness, who states:

I (Name of authorised witness),

a (Qualification of authorised witness)

certify the following matters concerning the making of this statutory declaration by the person who made it (**please cross out any text that does not apply*):

1. *I saw the face of the person OR
*I did not see the face of the person because the person was wearing a face covering, but I am satisfied that the person had a special justification for not removing the covering, and
2. *I have known the person for at least 12 months OR
*I have not known the person for at least 12 months, but I have confirmed the person's identity using an identification document and the document I relied on was

(Describe identification document relied on)

Signature of authorised witness

Date / /

Declaration by additional purchaser

I,

do solemnly and sincerely declare that:

1. I am:

- an Australian citizen an Australian resident
 a duly authorised officer of an Australian-owned body that is at least 50 per cent owned or controlled by persons who are Australian citizens, Australian residents or Australian-owned bodies

Name of Australian-owned body

- a trustee (natural person), where at least 50 per cent of the beneficial interest in the land is held by Australian citizens, Australian residents or Australian-owned bodies
 a duly authorised officer of a trustee company, where at least 50 per cent of the beneficial interest in the land is held by Australian citizens, Australian residents or Australian-owned bodies

Name of trustee company

2. the property will only be used for residential purposes
3. this agreement/transfer does not replace any agreement/transfer made before 1 July 2012 which was for the sale or transfer of substantially the same property
4. I have not received the benefit of a grant under the New Home Grant Scheme for any other agreement for sale or transfer entered into in the same financial year as this agreement for sale or transfer
5. I acknowledge that I may be required to pay any duty that is assessed or be liable for penalties and may also be prosecuted for making a false or misleading statement in or in connection with this application
6. where the property is vacant land, I acknowledge that construction of the home must commence within 26 weeks after the agreement is completed
7. where the purchase is an off the plan purchase, it is an agreement for the sale or transfer of land that is intended to be used as the site of a new home, which is to be built before the completion of the agreement
8. the agreement or transfer is not eligible for a duty exemption or concession under the First Home – New Home Scheme (not applicable for company purchasers)
9. I am not eligible for or have at any time been paid a grant under the First Home Owner Grant Scheme (First Home Owner Grant (New Homes) Scheme from 1 October 2012) in respect of this property (not applicable for company purchasers)
10. I undertake to notify the Commissioner of any details that change and affect the determination of this application.

I make this solemn declaration conscientiously believing the same to be true and by virtue of the provisions of the *Oaths Act 1900*

Declared at (Place) on (Date) / /

Signature of declarant

in the presence of an authorised witness, who states:

I (Name of authorised witness),

a (Qualification of authorised witness)

certify the following matters concerning the making of this statutory declaration by the person who made it (**please cross out any text that does not apply*):

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2. *I have known the person for at least 12 months OR
*I have not known the person for at least 12 months, but I have confirmed the person's identity using an identification document and the document I relied on was

(Describe identification document relied on)

Signature of authorised witness Date / /

EFT details

To be completed only if a Balance of Grant is payable. This payment will only be made upon completion of the purchase.

Account name										
Financial institution							Branch			
BSB number (must have 6 numbers)							-			
Account number (maximum of 9 numbers)										

Is the above account held by all purchasers? (This field is mandatory. Tick one.)

Yes No

Payment authority

This authority must be completed by all purchasers

I / We authorise the Chief Commissioner of State Revenue to issue the refund by way of EFT into the above nominated account

I / We are authorised to act on behalf of the company that is entitled to the refund

Name		
Company name (where applicable)		Position (where applicable)
Signature		Date / /


Name		
Company name (where applicable)		Position (where applicable)
Signature		Date / /

Name		
Company name (where applicable)		Position (where applicable)
Signature		Date / /

Privacy statement


Information collected from you on this form is required by the Office of State Revenue (OSR) to determine if you have a liability or entitlement. The information may be provided to third parties with your consent or as required or permitted by law. OSR will correct or update your personal information at your request. Read more about privacy at www.osr.nsw.gov.au


Contact details

 1300 139 814* (Monday – Friday, 8.30 am – 5.00 pm)

*Interstate clients please call (02) 9689 6200

 www.osr.nsw.gov.au

 duties@osr.nsw.gov.au

 Help in community languages is available.

Offices (Monday – Friday, 8.30 am – 4.30 pm)

 **Office address**

 **Postal address**

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132 Marsden Street, Parramatta

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Sydney NSW 2001

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Wollongong

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