

Credit Refund/Transfer Request Council Rates and Water Assessments



PRIVACY NOTICE: Livingstone Shire Council is collecting the personal information you supply on this form for the purpose of processing your request for a refund or transfer of funds from your rates or water account. Some of this information may be given to other sections of Council for the purpose of assessing your application.

Enquiries: (07) 4913 5000 or 1300 790 919
Email: lscrates@livingstone.qld.gov.au

Your personal details will not be disclosed to any other person or agency external to Council without your consent unless required or authorised by law.

APPLICANT / RATEPAYER DETAILS

| | | | |
|-----------------|----|--------|--|
| I/We: | | | |
| | of | | |
| Postal Address: | | | |
| Contact Phone: | | Email: | |
| Mobile: | | Fax: | |

Note: Communication details will be used to update Council's records.

PROPERTY INFORMATION

| | |
|--------------------------|--|
| Rates Assessment Number: | |
| Water Assessment Number: | |
| Property Location: | |

REASON FOR REFUND – ACCOUNTS MUST BE IN CREDIT TO ENABLE REFUND

| | |
|---|---|
| <input type="checkbox"/> Settlement | <input type="checkbox"/> Incorrect Reference Used |
| <input type="checkbox"/> Credit Balance | <input type="checkbox"/> Overpayment |

Ratepayers will be required to provide proof of payment or supporting documentation to enable Council to process your refund request and payments will be made to the ratepayer/owner unless all evidence is received. (See paragraph on the next page for more information.)

REFUND DETAILS

| | | |
|---------------------|--|-------------------------|
| Date/s of Payment/s | | Refund Amount: \$ _____ |
| | | |
| | | |
| | | |

PAYMENT DETAILS – TO BE MADE BY EFT

| | |
|--------------------|---------------|
| EFT DETAILS | |
| Bank Name: | Account Name: |
| BSB: | Account No.: |

TRANSFER DETAILS

PAYMENT FROM – Property Information (where the credit exists or incorrect payment made to-must be in credit)

| | |
|-------------------|----|
| Transfer Amount | \$ |
| Assessment Number | |
| Property Location | |

PAYMENT TO – Property Information (where the credit is to be transferred to)

| | |
|-------------------|--|
| Assessment Number | |
| Property Location | |

| | |
|---|----------------------|
| Signature/s: _____ (must be owner/s of property) - all owners signature required | Date: ____/____/____ |
|---|----------------------|

| | |
|---|----------------------|
| Signature/s: _____ (must be owner/s of property) - all owners signature required | Date: ____/____/____ |
|---|----------------------|

I/WE AGREE AS FOLLOWS:
That the information provided herein is true and correct in every particular and that all-material facts have been disclosed to Livingstone Shire Council. Please allow 7-10 working days from date of receipt of your application.

Click here to submit

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Refund or Transfer Fee

Council has introduced administration fees for the processing of refunds and transfers for Rates and Water Assessments, to cover the costs associated with facilitating these types of transactions. Council will permit one (1) refund or transfer per property free of charge per rating period to allow for one-off adjustments or accidental payments, however, further requests for refunds or transfers from the same assessment will attract new charges as outlined below.

Payment Transfer: A charge of \$20.00 will apply where monies are paid to an incorrect assessment and funds are required to be transferred to the correct assessment.

Payment Refund: A charge of \$20.00 will apply to assessments that have a credit balance and the property owner requests a refund of over-paid monies.

***Supporting Documentation:

- A copy of bank statement showing the payment and including your name(s), bank account details and address information or a copy of your receipt if payment was made with cash.
- For payments made after a rates search has been sourced, written confirmation from both solicitors will be required that these amounts refunded will not be adjusted at settlement.
- Ratepayers may be required to provide proof of payment or supporting documentation to enable Council to process your transfer request, unless all properties are owned by the same owner.

Exemptions:

- Charges will not apply if a credit has resulted from valuation and services adjustments, or amounts required to be paid to a previous owner following an adjustment or rebate.
- The administration fee will not apply if it is the first refund of transfer of monies request (effective 1 July 2023) in each rating period.

LODGING

IN PERSON – You can lodge your form at Council's Customer Service Centre

- **Yeppoon**, (Yeppoon Town Hall), 25 Normanby Street
- **Emu Park**, (Library), 7-9 Hill Street



- EMAIL the completed form to lscrates@livingstone.qld.gov.au

MAIL – Mail the completed form to 'Livingstone Shire Council, PO Box 2292, Yeppoon Queensland 4703

TELEPHONE – Call 1300 790 919 or 07 4913 5000 between 8am and 5pm Monday to Friday



- Online Services: www.livingstone.qld.gov.au



- Like us on Facebook: www.facebook.com/livingstoneshirecouncil

OFFICE USE ONLY

| | | | |
|---|---------------------------|-------------------|------------------------|
| Date form received: _____ | Amount Paid \$ _____ | Receipt No: _____ | Date Paid: ___/___/___ |
| Approved / Declined: (please circle) | Authorised Officer: _____ | Signature: _____ | |