



Portland Housing Bureau

Rental Services Office

Commissioner Dan Ryan • Interim Director Molly Rogers

1900 SW 4th Avenue, Suite 7007 • Portland, OR 97201

PHONE 503-823-1303 • FAX 503-865-3260

RentalServices@PortlandOregon.gov

Portland.gov/RSO

Rental Services Helpdesk Hours

MON, WED, FRI 9–11 am 1–4 pm

RELOCATION EXEMPTION APPLICATION (REA) FORM

Exemption 7: “A Dwelling Unit where the Landlord is terminating the Rental Agreement in order for an Immediate Family member to occupy the Dwelling Unit.”

General instructions for completing the Relocation Exemption Application (REA) Form to claim exemption from the obligation to pay city Relocation Assistance as specified in Portland City Code 30.01.085.

- Please print clearly and complete all sections of this form. All fields require a response (please use n/a to indicate not applicable). We cannot process illegible or incomplete REA Forms.
- This form is designed to be completed and signed by the legal Owner(s) of the Dwelling Unit where exemption from the obligation to pay city Relocation Assistance is claimed. If someone other than the Owner/Landlord is completing this form on behalf of the Owner/Landlord, documentation that conclusively demonstrates that the person completing the REA Form is authorized by the Owner/Landlord of the Dwelling Unit to certify facts and make legally binding statements on behalf of the Owner/Landlord must accompany this form.
- The Administrative Rules referenced in each REA Form identify stipulations with which a Landlord must comply in order to claim the exemption. If a Landlord fails to fully comply with each and all applicable stipulations, the Landlord’s claim of exemption is invalid.
- Supporting documentation is required for most exemptions. If supporting documentation is required, please review the Documentation Guidance and submit documentation that complies with the guidance, along with your signed and dated REA Form. **REA Forms that do not include documentation, where documentation is required, are incomplete and cannot be processed.**
- If you need assistance completing the REA Form, staff are available during the following hours, except on holidays, to provide technical assistance. Please be advised that the materials and information available through the Rental Services Office are for information purposes only. *Our staff cannot provide legal advice.*

Phone: (503) 823-1303

Rental Services Office Helpline Hours

Monday	9 - 11 AM, 1 - 4 PM
Wednesday	9 - 11 AM, 1 - 4 PM
Friday	9 - 11 AM, 1 - 4 PM



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RELOCATION EXEMPTION APPLICATION (REA) FORM 7:

“A Dwelling Unit where the Landlord is terminating the Rental Agreement in order for an Immediate Family member to occupy the Dwelling Unit.”

The following Administrative Rules and Process apply to Exemption 7:

- The Landlord must submit the required REA form to PHB.
- The Landlord must receive an Acknowledgment Letter issued by PHB. An Acknowledgement Letter does not exempt a Landlord from complying with all relevant notice requirements.
- The Landlord must provide a copy of all pages of the Acknowledgement Letter to the Tenant including a description of a Tenant's Rights and Obligations prior to issuing a Termination Notice.
- This exemption only applies when the Owner(s) of the Dwelling Unit have ownership interest in four or fewer Dwelling Units, excluding the Owner(s) of the Dwelling Unit's Principal Residence.
- This exemption only applies if the Landlord is issuing a Termination Notice.
- The Owner(s) of the Dwelling Unit must be Natural Person(s) to claim this exemption.
- The Landlord, including any Owner(s) of the Dwelling Unit, cannot live in the unit during the 24 months after the exemption is used.
- The Immediate Family member cannot be an Owner of the Dwelling Unit, the domestic partner or spouse of an Owner of the Dwelling Unit or have been an Owner of the Dwelling Unit in the 12 months prior to or after issuance of the Termination Notice.
- The Immediate Family Member must have reached the age of majority (18) or be a legally recognized emancipated minor.
- The Immediate Family member must move into the Dwelling Unit within 60 days of the Tenant moving out.
- The Dwelling Unit must become the Immediate Family Member's Principal Residence.
- The Immediate Family member must intend to reside in the Dwelling Unit for the 24-months after moving in.
- The Owner(s) of the Dwelling Unit shall not receive an Acknowledgement Letter for this exemption more than once every 36 months.



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STEP ONE: DOCUMENTATION GUIDANCE

This exemption may require supporting documentation.

Exemption 7 requires that the Dwelling Unit be owned by a Natural Person (a human being as opposed to an entity created by an operation of law). When ownership of a property is held by a Trust, the grantor/settlor and the beneficiary of the Trust are Natural Person(s) if they are human beings.

NOTE: The Immediate Family Member CANNOT be an owner of the Dwelling Unit nor can they be a grantor/settlor or a beneficiary of the Trust that owns the Dwelling Unit as Administrative Rules do not allow the Immediate Family Member to have ownership interest in the Dwelling Unit.

What must be demonstrated: The Landlord is a grantor/settlor or is a beneficiary of the Trust that owns a Dwelling Unit. Documentation that conclusively demonstrates that the Landlord is a grantor/settlor or beneficiary of the Trust that owns the Dwelling Unit for which exemption is requested includes all of the following:

- Document is dated prior to date of application.
- Document clearly identifies the Landlord, by name, as a grantor/settlor or a beneficiary.
- Document specifically names the Trust, and the name of the Trust must match the name of the Trust that is the legal owner of the Dwelling Unit.
- **Examples of documents that demonstrate that the Landlord is grantor/settlor or a beneficiary of the Trust that owns the Dwelling Unit** include a copy of the Trust instrument, or a related document prepared by the same professional legal, financial or estate advisor who prepared the Trust instrument and whose name and title appear in the document, so long as that document contains is dated prior to the date the REA Form is submitted and that it names the Trust and clearly identified the Landlord, by name, as the grantor/settlor or a beneficiary of the Trust.

STEP TWO: LANDLORD INFORMATION

1. Who is the Owner/Landlord of the Dwelling Unit?

Note: Acknowledgment Letters are issued in the legal property Owner(s) name(s)

NAME:					
MAILING ADDRESS:				UNIT:	
CITY:		STATE:		ZIP:	
PHONE:		EMAIL:			



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2. Who is the Immediate Family member for whose benefit this Rental Agreement is being terminated?

RELATIONSHIP:

- | | | |
|---|---|---|
| <input type="checkbox"/> Parent | <input type="checkbox"/> Child | <input type="checkbox"/> Step Sibling |
| <input type="checkbox"/> Grandparent | <input type="checkbox"/> Grandchild | <input type="checkbox"/> Sibling In-Law |
| <input type="checkbox"/> Foster Parent | <input type="checkbox"/> Foster Child | <input type="checkbox"/> Aunt |
| <input type="checkbox"/> Step Parent | <input type="checkbox"/> Step Child | <input type="checkbox"/> Uncle |
| <input type="checkbox"/> Parent In-Law | <input type="checkbox"/> Sibling | <input type="checkbox"/> Niece |
| <input type="checkbox"/> Grandparent In-Law | <input type="checkbox"/> Foster Sibling | <input type="checkbox"/> Nephew |

Name of Immediate Family Member: _____

STEP THREE: DWELLING UNIT INFORMATION

3. Which of the following best describes the ownership the Dwelling Unit?

- The Dwelling Unit is owned by a Natural Person (a human being as opposed to an entity created by an operation of law).
- The Dwelling Unit is owned by a Trust and the Landlord is a settlor/grantor or a named beneficiary (as opposed to a trustee) of the Trust that owns the Dwelling Unit.

4. What is the street address of the Dwelling Unit for which you are claiming exemption?

DWELLING UNIT ADDRESS:		UNIT:	
CITY:		STATE:	ZIP:

STEP FOUR: RENTAL AGREEMENT INFORMATION

5. This exemption will be applied to: (check one)

- A future tenancy/Rental Agreement with a Tenant who does not currently live in the unit.
- An existing tenancy/Rental Agreement where a Tenant already lives in the unit, including renewal or replacement of a previous lease or Rental Agreement.



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STEP FIVE: CERTIFICATIONS & ACKNOWLEDGEMENTS

Note: This REA Form is not complete unless all sections of the form are completed, the certifications and acknowledgment statements below are certified/acknowledged, the form is signed and dated, and any required documentation is attached.

1. I hereby certify that the owner(s) of this Dwelling Unit hold(s) an ownership interest in no more than four Dwelling Units, excluding the Owner(s) of the Dwelling Unit's Principal Residence.
 I so certify
 I do not so certify

2. I hereby certify that I have not received an Acknowledgment Letter for this exemption within the past 36 months.
 I so certify
 I do not so certify.

3. I hereby certify that the Immediate Family Member has reached the age of majority (18) or is a legally recognized emancipated minor.
 I so certify
 I do not so certify

4. I hereby certify that the Immediate Family Member is neither a grantor/settlor nor a beneficiary of the Trust that owns the Dwelling Unit.
 I so certify
 I do not so certify
 Does not apply (Dwelling Unit is not owned by a Trust)

5. I hereby certify that, to the best of my knowledge, the Immediate Family Member holds no ownership interest in the Dwelling Unit and that, to the best of my knowledge, the Immediate Family Member is not a spouse or domestic partner of an Owner of the Dwelling Unit.
 I so certify
 I do not so certify

6. I hereby certify that, to the best of my knowledge, the Immediate Family Member intends in good faith to reside in the Dwelling Unit for the 24 months after the Immediate Family Member has moved into the Dwelling Unit.
 I so certify
 I do not so certify



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7. I understand that the Administrative Rules referenced in this REA Form identify specific stipulations with which I must fully comply in order to claim exemption, and that if I fail to comply with each and all applicable stipulations, my claim of exemption is invalid. I understand that issuance of an Acknowledgment Letter does not constitute authorization for any action or inaction that is inconsistent with any and all applicable rules and laws.
- I so acknowledge
 - I do not so acknowledge
8. I acknowledge that, as a stipulation of this exemption, the Immediate Family Member cannot have been an Owner of the Dwelling Unit in the 12 months prior to, or after issuance of, the Termination Notice.
- I so acknowledge
 - I do not so acknowledge
9. I acknowledge that, as a stipulation of this exemption the Landlord, including any Owner(s) of the Dwelling Unit, cannot live in the unit during the 24 months after the exemption is used to terminate a tenancy.
- I so acknowledge
 - I do not acknowledge
10. I acknowledge that, as a stipulation of this exemption, the Immediate Family Member must move into the Dwelling Unit within 60 days of the Tenant moving out, and that the Dwelling Unit must become the Immediate Family Member's Principal Residence.
- I so acknowledge
 - I do not acknowledge
11. I acknowledge that this exemption applies only when issuing a notice terminating an existing tenancy/Rental Agreement and that this exemption cannot be applied to a future Rental Agreement with a Tenant who does not currently live in the Dwelling Unit.
- I so acknowledge
 - I do not acknowledge
12. I acknowledge that this exemption applies only when city Relocation Assistance is triggered by the termination of the Rental Agreement as described in PCC 30.01.085, and that it does not apply when Relocation Assistance is triggered by Rent increase(s) or by substantial changes to the terms of the Rental Agreement.
- I so acknowledge
 - I do not acknowledge
13. I acknowledge that exemption from obligation to pay city Relocation Assistance as required under PCC 30.01.085 does not extend to the notification requirements of that same section of City Code, nor does it exempt a Landlord from the limitations and obligations of any other applicable local, state or federal law. I understand that acknowledgment of my claim of exemption is not authorization for any action or inaction that is inconsistent with all applicable rules and laws.
- I so acknowledge
 - I do not so acknowledge



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14. I hereby certify that all information provided by me in the REA Form and/or provided in supporting documentation is current, true and complete to the best of my knowledge. I understand that I must inform the Portland Housing Bureau immediately and in writing of any changes. I understand that a Landlord that fails to comply with any of the requirements set forth in PCC 30.01.085 shall be liable to the Tenant for an amount up to 3 times the monthly Rent as well as actual damages, city Relocation Assistance, reasonable attorney fees, and costs.

- I so certify
- I do not so certify

Signature: _____ Date: _____