



ARTSPACE EVERETT LOFTS

2917 Hoyt Avenue, Everett, WA 98201
Serving Everett's Creative Community

Dear Applicant,

Thank you for your interest in the Artspace Everett Lofts. The Lofts provide 40-units of affordable housing for individuals and families, as well as a new arts education center on the ground floor, the Schack Art Center.

Developed by Artspace Projects, Inc., Everett Lofts are conveniently located in downtown Everett and offers our residents:

- Spacious one and two bedroom lofts ranging from 800 – 1,200 square feet,
- Open floor plans with high ceilings and durable surfaces,
- Large community room and on-site laundry facilities,
- 2nd Floor outdoor deck with city views,
- Underground parking with elevator access is available for our residents
- Located near bus lines and
- Public library, grocery store and other urban amenities are just blocks away.

Artspace is committed to attracting creative individuals and families from diverse backgrounds. We encourage all people to apply regardless of race, color, creed, religion, employment or occupation, national origin, ethnicity, gender, gender identity, marital status, familial status, sexual orientation, and status with regard to public assistance, or physical disability. Preference will be placed on applicants who can demonstrate a commitment to the creative arts. How much income (if any) that a qualifying applicant earns from his or her artistic pursuit is not considered in assessing whether the applicant has a commitment to or participation in a creative endeavor. We are especially interested in individuals who are committed to building community and will give some of their time and energy toward this goal. An artist's creative work need not be the person's occupation or source of income. It is customary for artists to work in another field to support themselves, their dependents, and their art form.

Enclosed you will find an application and information about housing. (Please note that the information is not all-inclusive and is subject to change.) Please read and complete the application. Due to our financing for the development of the building, we may require more information than you have had to provide before when renting. The types of information that we will require are explained on the following pages.

Gaye Barrett
Vice President
Quantum Management Services

Cathryn Vandenbrink
Regional Director
Artspace Projects, Inc

ARTSPACE EVERETT LOFTS APPLICATION

Applications for the Artspace Everett Lofts are currently being accepted. All applications will be time and date stamped as they are received.

Please mail applications to: Quantum Management Services
PO Box 2170
Lynnwood, WA 98036

Please email applications to: ArtSpaceEverett@Quantumms.com

Applications are available on-line at: <http://www.artspace.org/properties/everettwa/>

Please read through the entire application and provide all necessary materials.

When a loft is available and your name comes up, you will be contacted to begin the process to become a resident at the Everett Lofts. At this time, a screening packet will be sent to you. All household members over the age of 12 are screened for credit, criminal, and landlord reference checks. Please return the completed application and supplemental materials for each member of the household 17 years of age or older. Please note that a non-refundable application fee of \$37 per person over the age of 18 will be required; \$6 for each persons from 12 -17.

When the background check has been completed and approved by an independent company, management will then begin to process your Rental Eligibility Application (REA). When filling out the REA, and the verification forms, please keep in mind that management must verify any and all items marked "Yes". To speed up the process, please be sure to enclose **copies** of the following information/documentation for **each household member over the age of 17:**

- A **copy** of driver's license and social security card.
- If Self-Employed, we will need a signed copy of last year's federal tax return, including all attachments, such as Schedules C, E and F (if applicable). If you have been self-employed for less than one-year, you will need to sign a "Self-Employment Verification" form provided by management and we will require a Profit and Loss statement.
- If on Social Security/SSI, unemployment, disability or any government assistance, a copy of the most recent award letter from the agency. This letter informs the applicant what their benefits will be for the next year.
- Any pension/annuity/VA award letters. In the absence of an award letter, you will need to bring us the address of the agency, which we will need to complete the verification form. The applicant who receives this benefit must sign the corresponding verification form for any pensions/annuities.
- A copy of your most recent bank statement(s), which includes account number and address of bank. The applicant who owns the asset must sign the corresponding verification form for any assets.
- A copy of you most recent statement of investments, such as stocks, bonds, IRA's, CD's, 401(k), Money Market funds, etc. which includes the account number and address of the bank. The applicant who owns the asset must sign the corresponding verification form for any assets.
- A copy of any real estate contracts for sale or rental the applicant may be holding

which identifies the term, the amount and the interest rate. An amortization schedule, if available, would also be helpful.

- Child Support documentation. This form will need to be notarized to be accepted.
- On-going monetary gifts. This form will need to be notarized to be accepted.
- Records of a divorce decree, if alimony is received.
- A copy of the closing statement if any real estate has been bought or sold within the past 2 years.
- Verification of any assets that have been disposed of over the past 2 years for less than market value.

The process of verification may take up to several weeks to complete. Once it has been determined that your household is income qualified to reside at the Artspace Everett Lofts, management will notify you and you may proceed with the orientation interview.

If it is determined that your household is not income qualified to reside at the property, management will notify you as soon as possible.

Artist Selection Committee: Once management has determined income eligibility, applicants will be forwarded to the Artist Selection Committee (ASC). The ASC will initially be made up of Artspace staff and local artists. The ASC will meet to talk with all members of your household and will ask questions about your commitment to the arts, to the community and your interest in living at Everett Artspace Lofts. Artist interviews are typically scheduled for a half-hour time period. Prospective residents are given an opportunity to answer questions, show their portfolio/examples of their work and ask any questions they may have at that time. In the Artist Screening Committee interview, you must be prepared to demonstrate that you are actively engaged in an art form, are willing and able to contribute to a cooperative/creative environment and show a commitment to engage in the greater community. The Artist Selection Committee is a permitted preference, permitted screening criteria, pursuant to HUD Handbook 4350.3 2-25, which is subject to any applicable federal, state, or local preferences.

The committee will also review the enclosed Artistic Questionnaire that you will have completed. The selection committee screens applicants to determine their participation in, and commitment to, the arts; they do not judge the content of an applicant's artistic work.

Artistic processes that are extremely noisy, require industrial zoning or involve hazardous materials will not be permitted to be conducted in the building. (Welding, woodworking, glass blowing, amplified band practice would not be allowed.) An artist, for the purpose of this committee, is a person who is regularly engaged in the arts. This does not mean that the art the artist creates generates the artist's main source of income. Artist shall be defined as:

1. A person who works in or is skilled in any of the fine arts, including but not limited to painting, drawing, sculpture, book art, and print-making.
2. A person who creates imaginative works of aesthetic literature, costume design, photography, music composition and architecture.
3. A person who creates functional art, including but not limited to jewelry, rugs, decorative screens and grates, furniture, pottery, toys, and quilts.
4. A performer, including but not limited to singers, musicians, dancers, actors, and performance artists.

If it is determined by the ASC that your household is qualified for Artspace Everett Lofts, you will become eligible to move in. Management will notify you in writing as soon as possible of your application status and availability of units.

Please do not give notice to your landlord until you have received final notification of acceptance from management that you have been approved for occupancy of the Everett Artspace Lofts.

AFFORDABILITY RESTRICTIONS: (This information may be subject to change)

The Artspace Everett Lofts was made possible with financing that encourages affordable housing. As a result, units are restricted to residents who must fulfill certain income limitation and other requirements.

INCOME LIMITS: The following income guidelines are set for all residents. They reflect the current maximum amounts of household income for residents and are updated on an annual basis by information provided to management from HUD. If your household income exceeds these guidelines at initial occupancy, you will not be eligible for residence. Due to the financing commitments in place, management will not qualify any households that exceed the limits noted below. Everett Limited Partnership and Artspace Projects, Inc. have the legal responsibility to ensure that all residents are in compliance with the income limits at the time of move-in and are required to annually re-certify each household before the household's anniversary date of occupancy.

Based on current information, your gross annual household income must be below either of the following at the time of final certification for occupancy in Artspace Everett Lofts.

	<u>1 Person</u>	<u>2 Persons</u>	<u>3 Persons</u>	<u>4 Persons</u>	<u>5 Persons</u>
60%	\$35,400	\$40,440	\$45,540	\$50,580	\$54,600
50%	\$29,500	\$33,700	\$37,950	\$42,150	\$45,500

SOLE RESIDENCE: The unit must be the applicant's sole residence in order for the applicant to be eligible for housing.

RENTAL RATE INFORMATION (This information may be subject to change)

Monthly rent for the following units will be:

<u>UNIT TYPE</u>	<u>APPROXIMATE SQUARE FOOTAGE</u>
One Bedroom (25 units)	800-814 square feet
50% \$749	
60% \$850	
Two Bedrooms (15 units)	1,050-1,200 square feet
50% \$899	
60% \$1,000	

INTEREST LIST: If there are no available units, an applicant will be placed on an interest list on a first come first serve basis. Placement on a waiting list will be based on the date and time of receipt of the preliminary application materials enclosed. Additionally, in compliance with the existing In-House Move policy, existing residents shall be provided preference on units as they become available in accordance with the in-house move policy.

OCCUPANCY STANDARDS: The occupancy policy for Everett shall be:

Two per bedroom plus 1

Resident(s) acknowledge and agree that should the household's occupancy permanently fall below the standards established by ownership during the term of the household's tenancy, that the Resident(s) shall transfer into a unit within the property, that meets the standards established above, when an appropriate sized unit becomes available. This move shall be at the Resident's expense and within the terms established within this agreement.

FAIR HOUSING: We encourage all people to apply regardless of race, color, creed, religion, national origin, ethnicity, gender, gender identity, occupation, marital status, familial status, sexual orientation, political ideology, age, retaliation, and status with regard to public assistance, or physical disability.

SMOKE FREE COMMUNITY: Everett Artspace is a smoke-free facility. RESIDENT, Authorized Occupants, guests and other persons on the Property with RESIDENT'S or Authorized Occupant's consent shall refrain from smoking in the unit and in any common areas of the Property.

STUDENT STATUS GUIDELINES: Because of its financing, Everett has eligibility restrictions for full time students at the time of initial occupancy or at any time during the household's occupancy. A unit may be occupied by a full time student if at least one member of the household is not a full time student. In general, a household cannot be occupied only by full time students. Exceptions are:

- If the full time student(s) is married and filing a joint tax return(s);
- If the student is a single parent and receives Temporary Assistance for Needy Families (AFDC);
- If the student has minor children who are also students and no one is a dependant of a third party; or
- If the student is in a job training program under the Job Training Partnership Act or a similar program.
- At least one individual was previously under the care of a foster care program.

If a household falls within these exceptions, management may require additional verification of the exception. If a full-time student household applies and does not fall under any of these exceptions, program regulations state that the household will not be eligible for residency. If an existing household that was not previously a full-time student household at the time of occupancy become a full-time household and does not meet the exceptions above during the course of their tenancy, they will be required to vacate the property.

ADDING AN ADDITIONAL PERSON TO AN EXISTING HOUSEHOLD: Additional persons may be added to the original household after the first initial 6 months of occupancy has been achieved by the original lease signers. Any persons requested to be added to the household must go through the same process as the original household member including screening. The existing household is asked to re-certify at the same time. This allows verification of the combined household's income and puts the whole household on the same re-certification cycle. If the new household member over qualifies the household according to the tax credit program, the applicant can be accepted as a household addition with the stipulation that they have to move out when the other tenant does.

HOLDING DEPOSIT/SECURITY DEPOSIT: Management will require all applicants to provide a holding deposit and to sign a holding deposit agreement once management has determined the household is eligible for tenancy. At the time of occupancy, the holding deposit will revert to the household's security deposit. In the event the household is qualified to move into the property, but the household decides to withdraw their application, the holding deposit will be retained by management and not refunded to the applicant.

BUSINESS CONDUCTED FROM THE UNITS: The loft spaces at Everett have been designed to accommodate creative activity. Due to funding limitations, please know that you **may not** conduct any type of business from the units within the building as the units are to be used for your private dwelling.

BUSINESS CONDUCTED FROM THE COMMUNITY SPACES: Artspace Everett Lofts was substantially financed through the use of Low-Income Housing Tax Credits. The U.S. Internal Revenue Code, which governs how the credits are applied, is quite specific regarding matters of income qualification and the exclusion of commercial activity within residential common areas. It is incumbent upon the Partnership to ensure that no action, however unintentional, jeopardizes the good standing of the project with respect to the tax credit compliance requirements.

Residents may not engage in commercial activity in the common areas of the residential portion of the building, (hallways, community rooms, etc.) when such activity involves the extensive advertising of a specific service or product in exchange for a specified fee, tuition, or payment, or if an explicit event, demonstration, lecture or instructional program occurs on a repetitive, defined, and continuous schedule e.g. "...Every Tuesday and Thursday at 7:00pm October 1 through November 28...").

IN-HOUSE TRANSFERS: In-House moves are only granted for: 1) A reasonable accommodation; 2) A change in household composition requiring a different size unit after the 1st 6 months of occupancy.

PET POLICIES: Pets are allowed at Everett, but there are some limitations. A pet policy is available for review from Quantum Management Services. Only common household pets are allowed and is defined as: small birds confined to cages, tropical fish in tanks no larger than 20

gallons, cats and dogs. A pet deposit of \$300.00 will be required by each tenant keeping a cat or dog in his or her dwelling unit. No more than two pets per unit. Management will allow only one dog up to 60 lbs. Violation of any of the pet policies may be grounds for removal of a pet or termination of the pet owner's tenancy or both.

UNIT MODIFICATIONS: You will be able to make some modifications to your unit to meet the needs of your discipline. All modifications must meet fire and safety codes and have prior approval by management.

NOISE GUIDELINES: The Development has adopted some rules about noise. Quiet hours have been set for after 10 PM Sunday through Friday mornings; and after 12 a.m. Friday and Saturday nights until 8:00a.m. on Saturday and Sunday mornings. If you think noise from your unit may disturb your neighbors it is best to notify neighbors of expected duration of noise and negotiate an acceptable time for noisy activity. Neighbors may ask you to keep noise down during "non-quiet" hours. Both "noisier" households and "quieter" households need to be reasonable in their respective uses or requests during "non-quiet" hours..

HAZARDOUS MATERIALS: Tenants will be expected to store and dispose of all hazardous materials in accordance with Federal and State laws and all local ordinances. Health and Safety workshops will be offered to all tenants with safety information available on site.

PARKING: There are 40 parking spaces available and the current rate is \$50 per month rent.

Artspace Everett LOFTS

Art and Community Involvement

Please provide written answers to the following questions and **send this completed form along with the artist statement described below to Quantum along with your financial forms.** The Artist Screening Committee (ASC) will not be judging the quality of your writing nor the quality of your art work, but rather the depth of your engagement and commitment to your work. We fully understand that many gifted artists cannot explain their work well. Your skill at presenting and explaining the content of your work is not as important as showing a body of work and your plan to continue producing work.

An “Artist Portfolio and Community Involvement Interview” will be scheduled with you after you have passed your financial review. During the interview, you will be asked to present a portfolio of your work to the review panel that consists of Artists and Artspace staff. You will be expected to speak for approximately 5 minutes about your artistic practice in general and the specific projects you will be working on if you are to move into the building. After this, the panel will ask questions about your work, about living in a cooperative environment and about community involvement.

1. Please write an artist statement on a separate sheet of paper (max 1 page), outlining your artistic practice, and discuss the method and intention of your work. Please include how long you have been creating. You can write about specific projects that you are working on, or be more general.

2. What equipment and materials do you use in your art practice? Please be specific.

3. Artspace Everett Lofts depends on the active participation of its residents in order to keep growing as a creative community. Currently the residents are involved in a number of committees such as community room programming, deck garden maintenance and development, events planning committee. How do you see yourself contributing to the development of the community, and what kind of new initiatives would you like to start?

Please check the area where you have any experience or interest:

- | | |
|---|---|
| <input type="checkbox"/> Minor repairs | <input type="checkbox"/> Building security |
| <input type="checkbox"/> Cleaning and maintenance | <input type="checkbox"/> Property management |
| <input type="checkbox"/> Plumbing | <input type="checkbox"/> Volunteer board of directors |
| <input type="checkbox"/> Carpentry | <input type="checkbox"/> Childcare |
| <input type="checkbox"/> Gardening | <input type="checkbox"/> Recycling |

Other (please list) _____

Check One: Credit Report _____ Mini Report _____ Orca Report _____ Killer Whale Report _____

Non-Refundable
Screening Fee
\$ _____

RESIDENTIAL RENTAL APPLICATION / EACH ADULT MUST FILL OUT SEPARATE APPLICATION

Address of Rental Property: _____ Unit # _____ Rent Amount _____

Applicant's Complete Name: _____ Date of Birth: _____

SSN# _____ DL#/State issued: _____

Tel# _____ Email Address: _____

Other Occupant's Name, Age & Relationship: _____

If any of the above noted occupants are currently married or separated but not living with their spouse, please note yes or no: ___ Y ___ N

✓ Complete Every Item on Application. Incomplete and/or Inaccurate Information May Result in Process Delay or Denial of Tenancy.

CURRENT ADDRESS (Required Entry)

Street _____
City _____ State _____ Zip _____
Apt # _____ Name of Apts _____
How Long (Mo/Da/Yr) From _____ To _____
Pymts / Rent Pd To _____ Amt _____
Landlord/Mgmt Co. _____
Address _____
Tel# _____ Rent/Own/Lease _____

PRIOR ADDRESS (Required Entry)

Street _____
City _____ State _____ Zip _____
Apt # _____ Name of Apts _____
How Long (Mo/Da/Yr) From _____ To _____
Pymts / Rent Pd To _____ Amt _____
Landlord/Mgmt. Co _____
Address _____
Tel# _____ Rent/Own/Lease _____

✓ Current Employer _____ Tel# _____ Supervisor _____

Dept / Attached to _____ Occupation _____ Rank _____

Hire Date _____ Monthly Salary _____ Full Time _____ Part Time _____

Address _____ Suite _____ City _____ State/Zip _____

✓ Prior Employer _____ Tel# _____

Dept / Attached to _____ Occupation _____ Rank _____

Hire Date _____ Monthly Salary _____ Full Time _____ Part Time _____

Address _____ Suite _____ City _____ State/Zip _____

✓ Additional Income (Interest, Child Support, Etc) _____

✓ Bank _____ Acct# _____ Branch _____ Tel# _____

✓ Pets? Yes _____ No _____ If yes, number, size, and type(s) _____

✓ Disability status and require special accommodations? _____

HAVE YOU OR ANY OTHER HOUSEHOLD MEMBER:

Ever been evicted or refused to pay rent? Yes _____ No _____ Ever been Charged or Convicted of a Crime? Yes _____ No _____

If yes to any of the above, give details: What is the nature of the offense? What County(ies) and State(s)? _____

When? _____

Ever used any other name(s)? Yes _____ No _____ If yes, list name(s) _____

Are you or any other household member a Registered or Unregistered Sex Offender? Yes _____ No _____

Are you or any other household member currently using any illegal drugs? Yes _____ No _____

Auto/Year/Make/Lic#: 1.) _____ 2.) _____

Local Contact _____ Address _____ Tel# _____

Nearest Relative _____ Address _____ Tel# _____

Emergency Contact _____ Address _____ Tel# _____

THE DECISION TO LEASE/RENT REMAINS WITH THE PROPERTY MANAGER

Arstpace Everett Lofts Phone #: (425) 776-1294
Quantum Management Fax #: (425) 776-1073

Orca Information, Inc.
Phone: 360-588-1633/800-341-0022
Fax: 360-588-1189/800-522-6722/866-268-0188



RENTAL ELIGIBILITY APPLICATION (REA)

Property Name: _____ Unit: _____

Head of Household Name: _____

Effective Date of Certification: _____ Original Certification Date: _____

Certification Type: Move-In Annual Re-certification

Household Size: _____ Number of Bedrooms: _____

THE FOLLOWING SECTION IS TO BE COMPLETED ENTIRELY BY THE APPLICANT/RESIDENT

HOUSEHOLD COMPOSITION				
Hshld Mbr	Name	Date of Birth	Social Security No. *	Fulltime Student Next 12 Months?
Head	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
2.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
3.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
4.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
5.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
6.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No
7.	_____	_____	_____	<input type="checkbox"/> Yes <input type="checkbox"/> No

Household Member's Name: _____

Income Source or Employer: _____ Phone: _____

Address: _____

Position: _____ Hire Date: _____

Supervisor: _____ Income/Salary: \$ _____

Household Member's Name: _____

Income Source or Employer: _____ Phone: _____

Address: _____

Position: _____ Hire Date: _____

Supervisor: _____ Income/Salary: \$ _____

REA INCOME/ASSETS QUESTIONNAIRE

Each Household Member 18 Years or Older Must Complete a Separate Questionnaire

Property Name: _____ Unit: _____

HOUSEHOLD MEMBER: (please check one) Head 2 3 4 5 6 7

Household Member Name: _____

INCOME

- | | Yes | No | |
|-----|--------------------------|--------------------------|---|
| 1. | <input type="checkbox"/> | <input type="checkbox"/> | Are you employed or have a verifiable start date within the next 12 months?
a. \$ _____ Annual Gross Wages or Salary
b. \$ _____ Annual Overtime Income
c. \$ _____ Annual Bonus/Commission/Tip Income |
| 2. | <input type="checkbox"/> | <input type="checkbox"/> | Are you presently employed at an additional job (NOT self-employed)?
a. \$ _____ Annual Gross Wages or Salary
b. \$ _____ Annual Overtime Income
c. \$ _____ Annual Bonus/Commission/Tip Income |
| 3. | <input type="checkbox"/> | <input type="checkbox"/> | Are you self-employed? (Attach signed tax return and appropriate schedules.)
\$ _____ Annual Net Business Income |
| 4. | <input type="checkbox"/> | <input type="checkbox"/> | Are you receiving Social Security (SSA) and/or Supplemental Social Security (SSI) or WA State SSI for yourself or on behalf of any other member of the household?
a. \$ _____ SSA Annual Gross Income (before Medicare deduction)
b. \$ _____ SSI Annual Gross Income (before Medicare deduction)
c. \$ _____ WA State SSI |
| 5. | <input type="checkbox"/> | <input type="checkbox"/> | Are you currently receiving or do you anticipate receiving child support or alimony in the upcoming 12 months?
\$ _____ Annual Income |
| 6. | <input type="checkbox"/> | <input type="checkbox"/> | Are you receiving public assistance (TANF, GAU, FIP, ADATSA)?
\$ _____ Annual Income |
| 7. | <input type="checkbox"/> | <input type="checkbox"/> | Do you currently receive unemployment, Labor & Industries, or disability benefits?
\$ _____ Weekly/Monthly Income |
| 8. | <input type="checkbox"/> | <input type="checkbox"/> | Are you a member of the Armed Forces (Active, National Guard or Reserves)?
\$ _____ Annual Income (Include all pay & allowances excluding "imminent danger pay.") |
| 9. | <input type="checkbox"/> | <input type="checkbox"/> | Are you receiving income from a pension, annuity, retirement fund, insurance policy payments, death benefits or Veteran's Benefits (not GI Bill benefits)?
\$ _____ Annual Income |
| 10. | <input type="checkbox"/> | <input type="checkbox"/> | Are you receiving money regularly from your family, church, friends, or any other form of regular/periodic income (such as rent and utility payments)?
\$ _____ Annual Income (attach notarized affidavit) |
| 11. | <input type="checkbox"/> | <input type="checkbox"/> | If you are a student, do you receive financial aid?
\$ _____ Total Amount of Aid Received |

REA INCOME/ASSETS QUESTIONNAIRE

Net Household Assets \$5,000 or Over Must be Verified by a Third Party

Property Name: _____ Unit: _____

Household Member Name: _____

- | | Yes | No | | | |
|-----|--------------------------|--------------------------|--|----------------------------------|-----------------------------------|
| 12. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have any bank account(s) | Total # of Accounts | _____ |
| | | | a. \$ _____ Current Balance: | <input type="checkbox"/> Savings | <input type="checkbox"/> Checking |
| | | | b. \$ _____ Annual interest earned | | |
| | | | c. \$ _____ Current Balance: | <input type="checkbox"/> Savings | <input type="checkbox"/> Checking |
| | | | d. \$ _____ Annual interest earned | | |
| 13. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have any money market account(s)? | Total # of Accounts | _____ |
| | | | a. \$ _____ Current Value of Account(s) | | |
| | | | b. \$ _____ Annual interest earned | | |
| 14. | <input type="checkbox"/> | <input type="checkbox"/> | Do you own any treasury bills, certificate(s) of deposit (CDs), or stocks/bonds (NOT held in a retirement plan)? | Total # of Accounts | _____ |
| | | | a. \$ _____ Current Value of Account(s) | | |
| | | | b. \$ _____ Annual Income | | |
| 15. | <input type="checkbox"/> | <input type="checkbox"/> | Do you receive money from a trust fund? | Total # of Funds | _____ |
| | | | <input type="checkbox"/> revocable or <input type="checkbox"/> non-revocable | | |
| | | | a. \$ _____ Current Value of Account(s) | | |
| | | | b. \$ _____ Annual income received | | |
| 16. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have a 401(k)/IRA/Keogh? | | |
| | | | a. \$ _____ Current value | | |
| | | | b. \$ _____ Annual interest earned | | |
| 17. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have a pension or annuity asset? (NOT receiving income currently.) | | |
| | | | \$ _____ Current value | | |
| 18. | <input type="checkbox"/> | <input type="checkbox"/> | Do you have net income from rental property (attach signed tax return with Schedule E)? | | |
| | | | a. \$ _____ Current value of real estate | | |
| | | | b. \$ _____ Annual net income | | |
| 19. | <input type="checkbox"/> | <input type="checkbox"/> | Do you own OR are you in the process of selling any real estate or do you hold a contract for real estate sold? | | |
| | | | a. \$ _____ Current value (or current contract amount) | | |
| | | | b. \$ _____ Annual interest earned | | |
| 20. | <input type="checkbox"/> | <input type="checkbox"/> | Do you own personal property held strictly as investment assets (art, coins, etc.)? | | |
| | | | \$ _____ Current value | | |
| 21. | <input type="checkbox"/> | <input type="checkbox"/> | Have you disposed of assets within the last two years for less than fair-market value? | | |
| | | | a. \$ _____ | | |

AUTHORIZATION TO RELEASE CONFIDENTIAL INFORMATION

Property Name: _____ Unit: _____

As a condition of participating in an affordable housing program, I understand the property owner is required to annually certify each resident's eligibility for such program. In order to do so, I understand it is necessary for me to give authorization for specific income and asset information to be provided on one or more of the following forms:

Employment Verification
Social Security/Supplemental Security Income Benefits Verification
Public Assistance Verification
Unemployment Benefits Verification Request
Military Pay Verification
Pension Verification Request
Annuity or Stock Verification
Deposit Verification Request

This Authorization is limited to the forms listed above and expires 180 days after the date of my signature below unless revoked in writing by me earlier. By my signature below, I authorize the representative individuals to disclose my specific income and asset information as requested on the forms above. No other information may be released without my express written authorization.

Notice to applicant/resident: Do not sign this document unless the authorized management agent's signature appears at the bottom of this page.

Signature of Applicant/Resident

Print Name of Applicant/Resident

Date

By the signature of its authorized management agent below, and in consideration for execution of this Authorization by the applicant/resident, property representatives warrant the following:

1. Information requested on the above form is required and necessary to complete certification of the applicant/resident's eligibility to reside in the above housing property;
2. The information requested above will be used for no purpose other than determining such resident's eligibility; will be maintained as confidential personal information subject to disclosure only as required by proper administrative or judicial process, and will not be otherwise disclosed by the property owner or management; and
3. The property owner and management have instituted procedures that insure all personally identifiable information provided pursuant to this authorization will be maintained as (a) confidential personal information, (b) separate from that of other residents, and (c) using such physical and other security measures, including security measures for protection of records maintained in electronic or magnetic form, sufficient to protect such information from any unauthorized use, access, or disclosure.

Signature of Authorized Management Agent

Print Name of Agent

Title of Agent

Date