

**BETHEL ESTATES OF GARDNER  
APPLICATION & QUESTIONNAIRE  
Low Income Housing Tax Credit Program**

Date: \_\_\_\_\_

Applicant: \_\_\_\_\_ Social Security #: \_\_\_\_\_  
                     First Name Middle Initial Last Name

Date of Birth: \_\_\_\_\_

Current Address: \_\_\_\_\_  
                                     Number, Street, Apt #                                      City                                      State

Daytime Phone: \_\_\_\_\_ Evening Phone: \_\_\_\_\_

Complete the following information for each household member that will occupy the unit at time of move-in.

Household Members Name(s)	Relationship	Sex	Social Security #	Date of Birth

Is there anyone other than those listed on this application whose credit may impact on yours? Yes\_\_\_ No\_\_\_

If yes explain: \_\_\_\_\_

**Answer either Yes or No to each question.**

Yes NO 1. Do you have a pet?  
                                     Type: \_\_\_\_\_  
                                     Breed: \_\_\_\_\_  
                                     Weight: \_\_\_\_\_

Yes NO 2. Do you expect any additions to the household within the next twelve months?  
                                     Name and Relationship: \_\_\_\_\_  
                                     Explain: \_\_\_\_\_

Yes NO 3. Do you have full custody of your child(ren)?  
                                     Explain of custody arrangements.  
                                     \_\_\_\_\_

Yes NO 4. Have you or anyone else named on this application ever filed bankruptcy? Explain: \_\_\_\_\_  
                                     \_\_\_\_\_

Yes NO 5. Have you or anyone else named on this application ever been convicted of a felony? Explain: \_\_\_\_\_  
                                     \_\_\_\_\_

**Residence History:**

List the past THREE years of housing references. (If additional space is required use the back of this page.)

Landlords Name/Address	Your address	Own/Rent (circle one)	Dates
1. _____	_____	Own/Rent	_____

\_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

2. _____	_____	Own/Rent	_____
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\_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

3. . _____	_____	Own/Rent	_____
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\_\_\_\_\_  
\_\_\_\_\_

Phone Number: \_\_\_\_\_

Yes or No Have you or anyone else named on this application ever been evicted for any reason?

Explain: \_\_\_\_\_

**Personal References:**

List a personal reference other than a relative.

1. Name/Address of Reference

\_\_\_\_\_  
\_\_\_\_\_

Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_ Years known: \_\_\_\_\_

**Vehicle Identification:**

1. License #: \_\_\_\_\_ State Issued: \_\_\_\_\_ Make/Model/Year: \_\_\_\_\_

2. License #: \_\_\_\_\_ State Issued: \_\_\_\_\_ Make/Model/Year: \_\_\_\_\_

**Emergency Contact:**

Name/Address (If possible list someone in the area that is not listed on application.) \_\_\_\_\_

Phone: \_\_\_\_\_ Relationship: \_\_\_\_\_

**Income Information:**

Include all income anticipated for the next 12 months. Include all dollar amounts in the space provided. Check Yes or No to each question.

Do you or anyone in your household receive or expect to receive income from:

Yes	No	1. Employment wages or salaries? (Include overtime, tips, bonuses, commissions, and payments received in cash.)		
		<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
		_____	_____	_____
		_____	_____	_____

Yes or No	2. Self-Employment?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	
	_____	_____	_____	
	_____	_____	_____	

Yes or No	3. Regular pay as a member of the Armed Forces?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	
	_____	_____	_____	
	_____	_____	_____	

Yes or No	4. Unemployment benefits or workman's compensation?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	
	_____	_____	_____	
	_____	_____	_____	

Yes or No	5. Public Assistance, General Relief or Aid to Families with Dependent Children?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	
	_____	_____	_____	
	_____	_____	_____	

Yes or No	6. Child support or alimony? (Any <b>awarded</b> amounts-collect or uncollected)			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	
	_____	_____	_____	
	_____	_____	_____	

	_____	_____	_____
Yes or No	7. Social Security, SSI, or any other payments from the Social Security?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	8. Veteran's benefits, pensions, retirement benefits, or annuities?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	9. Severance Payments?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	10. Settlements? (Such as insurance settlements)		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	11. Disability, death benefits, or life insurance dividends?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	12. Regular gifts or payments from anyone outside of the household. (This includes anyone supplementing your income or paying any of your bills)		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____
Yes or No	13. Educational grants, scholarships, or other student benefits?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>

_____	_____	_____
_____	_____	_____

Yes or No	14. Lottery winnings or inheritances?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____

Yes or No	15. Payments from rental property, land contracts, or other forms of real estate?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____

Yes or No	16. Any other income sources or types not listed?		
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>
	_____	_____	_____
	_____	_____	_____

**Asset Information:**

Include all assets held and the corresponding annual interest rate, dividends, or any other income derived from the asset. An asset is defined as any lump sum amount that you hold and currently have access to. Include the value of the asset and corresponding income from the asset in the space provided.

**Include all assets held by ALL household members including minors.**

Do you or anyone in your household hold:

Yes or No	1. Checking, savings account or prepaid debit card?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	<u>Account #</u>
	_____	_____	_____	_____
	_____	_____	_____	_____
	_____	_____	_____	_____

Yes or No	2. CD's, money market accounts, or treasury bills?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	<u>Account #</u>
	_____	_____	_____	_____
	_____	_____	_____	_____

Yes or No	3. Stocks, bonds, or securities?			
	<u>Source</u>	<u>Household Member</u>	<u>Amount</u>	<u>Account #</u>
	_____	_____	_____	_____

\_\_\_\_\_  
\_\_\_\_\_

Yes or No

4. Trust funds?

Source                      Household Member                      Amount                      Account #

\_\_\_\_\_  
\_\_\_\_\_

Yes or No

5. Pensions, IRAs, KEOGH, or other retirement accounts?

Source                      Household Member                      Amount                      Account #

\_\_\_\_\_  
\_\_\_\_\_

Yes or No

6. Cash on hand over \$500.00?

Household members: \_\_\_\_\_

Amount: \_\_\_\_\_

Yes or No

7. Real estate, rental property, land contracts/contract for deeds or other real estate holdings? (This includes your personal residence, mobile homes, vacant land, farms, vacation homes, or commercial property?)

Type                      Household Member                      Value

\_\_\_\_\_  
\_\_\_\_\_

Yes or No

8. Personal property as an investment? (this includes paintings, coin, or stamp collections, artwork, collector, or show cars, and antiques)

Type                      Household Member                      Value

\_\_\_\_\_  
\_\_\_\_\_

Yes or No

9. A safe deposit box?

Household Member: \_\_\_\_\_

Monetary Value of Contents: \_\_\_\_\_

Yes or No

10. Have you or any household member disposed of or given away any asset(s) for LESS than fair market value within the past 2 years?

Household Member : \_\_\_\_\_

Amount: \_\_\_\_\_

Explain: \_\_\_\_\_

**Zero Income Verification:**

Are **you** or is **any other adult** member of your household:

Yes or No 1. Claiming zero income? If so, who? \_\_\_\_\_

**Student Information:**

Are **you** or **anyone** in your household:

Yes or No 1. Currently a full-time student, or planning to be one within the next 12 months?

**IF YES student must continue on with the following questions:**

You will need to provide verification of all items to which you answered yes.

Yes or No a. Are you married and currently filing a joint tax return?

Yes or No b. Are you receiving AFDC (Aid to Families with Dependent Children?)

Yes or No c. Are you enrolled in the Job Training Partnership Act (JTPA) or another similar local, county, or state program?

Yes or No d. Are you a single parent with child (ren) and neither you nor the child (ren) are dependents on anyone else's tax return?

Yes or No e. Will you be living with someone who is not a full time student? If so, who? \_\_\_\_\_

**Live in Care Attendant:**

Yes or No 1. Will you or anyone in your household require a live in care attendant?

Name of Live in Care Attendant: \_\_\_\_\_

Relationship (If any): \_\_\_\_\_

**Section 8 Rental Assistance:**

Yes or No 1. Will your household be receiving Section 8 rental assistance at time of move-in?

Name of Agency: \_\_\_\_\_

Contact Person Name: \_\_\_\_\_

2. Will your household be eligible or are you applying to receive Section 8 rental assistance in the next 12 months?

Explain: \_\_\_\_\_

Name of Agency: \_\_\_\_\_

All questions that were answered **Yes** will be verified through the appropriate third-party source. It will be your responsibility to provide management with all necessary information to properly process your application and verify your eligibility. This will include names, addresses, phone and fax numbers, account numbers where applicable and any other information required to expedite this process.

**Signature Clause:**

I understand that management is relying on this information to prove my household's eligibility for the Low Income Housing Tax Credit Program. I certify that all information and answers to the above questions are true and complete to the best of my knowledge. I consent to release the necessary information to determine my eligibility. I understand that providing false information or making false statements may be grounds for denial of my application. I also understand that such action may result in criminal penalties.

I authorize my consent to have management verify the information contained in this application for purposes of proving my eligibility for occupancy. I will provide all necessary information and expedite this process in anyway possible. I understand that my occupancy is contingent on meeting management's resident selection criteria and the Low Income Housing Tax Credit Program requirements.

**All ADULT household members must sign below:**

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_

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Signature \_\_\_\_\_ Date \_\_\_\_\_





**SELF-AFFIDAVIT**

Head of Household's Name: \_\_\_\_\_ Date: \_\_\_\_\_

Initial Certification: \_\_\_\_\_ Date Expected to Move-In: \_\_\_\_\_

Recertification: \_\_\_\_\_ Effective Date: \_\_\_\_\_  
Annual or Interim

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You have applied to live in an apartment that is governed by the federal government's Housing Credit Program. This Program requires us to certify all of your income, asset, and eligibility information as part of determining your household's eligibility. Program requirements state we must verify each income and asset source as well as other claims of eligibility. We must determine this prior to granting your eligibility and, if such eligibility is granted, each subsequent year you remain in the unit.

I, \_\_\_\_\_, certify that:  
the information above is true and complete to the best of my knowledge. I understand that providing false or misleading information is a breach of my lease and may be subject to criminal penalties.

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Signature of applicant: \_\_\_\_\_ Date: \_\_\_\_\_

Signature of Notary Public: \_\_\_\_\_ Date: \_\_\_\_\_

State Commission Issued: \_\_\_\_\_ Commission Expiration Date: \_\_\_\_\_

**BETHEL ESTATES OF GARDNER**

**TENANT RELEASE AND CONSENT**

I/We \_\_\_\_\_, the undersigned hereby authorize all persons or companies in the categories listed below to release without liability, information regarding Employment, Income, and/or Assets to Bethel Estates of Gardner (owner or agent), for purposes of verifying information on my/our apartment rental application.

**INFORMATION COVERED**

I/We understand that previous or current information regarding me/us may be needed. Verifications and inquiries that may be requested include, but are not limited to Personal Identity: Employment, Income, and Assets: Medical or Childcare allowances. I/We understand that this authorization cannot be used to obtain information about me/us that is not pertinent to my eligibility for and continued participation as a Qualified Tenant.

**GROUPS OR INDIVIDUALS THAT MAY BE ASKED**

The groups or individuals that may be asked to release the above information includes, but are not limited to:

- |                                |                    |                         |
|--------------------------------|--------------------|-------------------------|
| Past Present Employers         | Welfare Agencies   | Veterans Administration |
| State Unemployment Agencies    | Previous Landlords | Retirement Systems      |
| Social Security Administration | Providers          | Medical & Childcare     |
| Support and Alimony            | Banks              | Universities or schools |

**CONDITIONS**

I/We agree that a photocopy of this authorization may be used for the purposes stated above. The original of this authorization is on file and will stay in effect for a year and one month from the date signed. I/We understand I/We have a right to review this file and correct and information that is incorrect.

**SIGNATURES**

\_\_\_\_\_  
Applicant/Resident

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date

\_\_\_\_\_  
Applicant/Resident

\_\_\_\_\_  
Print Name

\_\_\_\_\_  
Date