

# MANSFIELD MEADOWS APARTMENTS

9 Bonney Lane – Mansfield, MA 02048 ■ Tel (508)339-3357 ■ Fax (508)339-9761

## RENTAL APPLICATION (Affordable Programs)

Please Print Clearly

<b>This is a Rental Application for:</b>	<b>Community Name: Mansfield Meadows</b>
<b>Please complete this application and return to:</b>	<b>Name: Mansfield Meadows</b> <b>Address: 9 Bonney Lane</b> <b>Mansfield, MA 02048</b>

Instructions for Head of Household:

1. Please complete all sections by printing in ink. Please do not leave any section blank, including sections which do not apply to you. For instance, if a section asks for Social Security Income and you do not have Social Security Income, you may write "None" or "N/A" (not applicable). If you need to make a correction, put one line through the incorrect information, write the correct information above, and initial the change. Do not use correction fluid of any kind (e.g. "Whiteout").
2. As a 'senior' head of household, you should complete the Rental Application in its entirety. Each additional household member 62 years of age and older who will live in the apartment must also sign and date the Rental Application.
3. It is important that all information on this form be complete and correct. False, incomplete or misleading information will cause your household's application to be declined.
4. As long as your application is on file with us, it is your responsibility to contact us when ever there is a change in your address, telephone number, income situation or household composition (if you need to add or remove a person from your application).
5. After we receive your application, we will make a preliminary determination of eligibility. If your household appears to be eligible for housing, your application will be placed on a waiting list, but this does not mean that your household will be offered an apartment. If later processing establishes that your household is not actually eligible or not actually qualified for housing, your application will be declined. We will process your application according to our standard procedures, which are summarized in the Resident Selection Criteria. If there is no wait for an apartment and your application appears to be eligible, we will contact you to continue processing your application.



For Office Use Only  
Place date/time stamp here

### A. GENERAL INFORMATION

Yardi entry date: \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_ by: \_\_\_\_\_

Applicant Name(s): \_\_\_\_\_

Address: \_\_\_\_\_  
Street Apt.# City State ZIP

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

Email: \_\_\_\_\_

Number of BR's in current apt: \_\_\_\_\_

Do you  RENT or  OWN (check one)

Amount of current monthly rental or mortgage payment: \$ \_\_\_\_\_

If owned, do you receive monthly rental income from property?  Yes  No (check one)

Check utilities paid by you:  Heat  Electricity  Gas  Other (specify)

Approximate monthly cost of utilities paid by you (excluding phone, cable TV and Internet): \$ \_\_\_\_\_

Bedroom size requested:  One BR  Two BR  Three BR  Handicap Accessible

How did you hear about this Beacon Community? \_\_\_\_\_

Why have you selected/applied to live at a Beacon community? \_\_\_\_\_

Do you or any members of your household require any reasonable accommodations to be made to your apartment home? (i.e., wheelchair access, apparatus for the hearing impaired, etc.)  Yes  No

Do you have a Housing Choice Voucher (i.e. Section 8 Voucher)?  Yes  No (check one)  
If yes, from which Housing Authority? \_\_\_\_\_ (please attach copy of your voucher).

### B. HOUSEHOLD COMPOSITION

List ALL persons who will live in the apartment. List the head of household first.

	Name	Relationship to head	Birth Date	Age	SS#	Student Y/N (If yes, note Part time or full time)
Head						
Co-Head						
3.						
4.						
5.						
6.						
7.						
8.						



Do you anticipate any additions to the household in the next twelve months? <input type="checkbox"/> Yes <input type="checkbox"/> No
If yes, explain:

### C. STUDENT ELIGIBILITY

#### **STUDENT ELIGIBILITY FOR THE LOW INCOME HOUSING TAX CREDIT PROGRAM**

Will all of the persons in the household be or have been full time students during five calendar months of this calendar year, or the upcoming calendar year at an educational institution (other than a correspondence school) with regular faculty and students?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, answer the following questions:		
Are any full-time student(s) married and filing a joint tax return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Are any student(s) enrolled in a job-training program receiving assistance under the Job Training Partnership Act?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the full time student a Title IV/TANF recipient?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Is the full time student a single parent living with his/her minor child and the parent and child are not dependants on another's tax return?	<input type="checkbox"/> Yes	<input type="checkbox"/> No

#### **STUDENT ELIGIBILITY FOR HUD PROGRAMS ONLY**

Is this household applying for project-based Section 8 rental assistance?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If no, no further questions are necessary to determine student eligibility, If yes, answer below.		
Are any household members full or part-time students who are applying for the subsidy separate from their parent or guardian?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, additional documentation may be required to determine eligibility when an apartment is available.		

### D. CRIMINAL & RENTAL HISTORY BACKGROUND

Are you currently under eviction or have you been evicted?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, describe:		
Have you or any member of your household ever been convicted of or pled guilty or "no contest" to any felony?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you or any member of your household ever been convicted of or pled guilty or "no contest" to a sexual offense?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Have you or any member of your household ever been convicted of or pled guilty or "no contest" to any drug-related criminal offense?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Do you have a registration requirement under a state sex offender registration program?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
If yes, in what state?		
If yes, is the registration a lifetime requirement?	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Note: Federal regulations prohibit the admission to federally assisted housing of persons with a lifetime registration requirement under a state sex offender registration program.		



**E. INCOME**

List ALL sources of income as requested below. If a section doesn't apply, cross out or write "NA". **Do not leave any section BLANK. Attach appropriate documentation for each income source to this application** (e.g. Social Security benefits statement, pay stubs, if applicable, etc.).

Household Member Name	Source of Income	Gross Monthly Amount
	Social Security	\$
	Social Security	\$
	Social Security	\$
	SSI Benefits	\$
	SSI Benefits	\$
	SSI Benefits	\$
	Title IV/TANF	\$
	Pension (list source)	\$
	Pension (list source)	\$
	Adoption Subsidy	\$
	Annuity Income	\$
	Veteran's Benefits (list claim #)	\$
	Disability Income	\$
	Unemployment Compensation	\$
	Worker's Compensation	\$
	Military Pay	\$
	Contributions to the Household (monetary or otherwise)	\$
	Net Income from a Business	\$
	Grants, Scholarships or other Financial Aid?	\$
	For the student(s) receiving financial aid are they over age 23 with dependent children?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	For the student(s) receiving financial aid are they applying for Section 8 as part of their parent/guardian's household?	<input type="checkbox"/> Yes <input type="checkbox"/> No
	Interest Income (source)	\$
	Rental Income from Real Estate	\$
	Long Term Medical Care Insurance Payments in excess of \$180/day	\$



**Please attach your 2 most recent, consecutive pay stubs and/or other proof of income**

Household Member Name	Source of Income	Gross Monthly Amount
	<b>Employment amount</b> Employer: Position Held How long employed:	\$
	<b>Employment amount</b> Employer: Position Held How long employed:	\$
	<b>Employment amount</b> Employer: Position Held How long employed:	\$
	<b>Employment amount</b> Employer: Position Held How long employed:	\$
	<b>Alimony</b> Are you <b>legally entitled</b> to receive alimony? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list the amount you are <b>entitled</b> to receive. \$ Do you receive alimony? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes list amount you receive. \$	
	<b>Child Support</b> Are you <b>legally entitled</b> to receive child support? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes list the amount you are <b>entitled</b> to receive. \$ Do you receive child support? <input type="checkbox"/> Yes <input type="checkbox"/> No If yes, list the amount you receive. \$	
	<b>Other Income</b>	\$
	<b>Other Income</b>	\$
<b>TOTAL GROSS ANNUAL INCOME</b> (Based on the monthly amounts listed above x 12)		\$
TOTAL GROSS ANNUAL INCOME FROM PREVIOUS YEAR		\$
Do you anticipate any changes to this income in the next 12 months?		<input type="checkbox"/> Yes <input type="checkbox"/> No
Is any member of the household legally entitled to receive income assistance?		<input type="checkbox"/> Yes <input type="checkbox"/> No
Is any member of the household likely to receive income or assistance ( <i>monetary or not</i> ) from someone who is not a member of the household as listed on Page 2?		<input type="checkbox"/> Yes <input type="checkbox"/> No
If yes to any of the above, explain:		



## F. ASSETS

List assets for ALL household members, 18 years or older.  
If your assets are too numerous to list here, please attach additional list.  
If a section doesn't apply, cross out or write NA.

Checking Accounts	#	Bank	Balance \$	
	#	Bank	Balance \$	
	#	Bank	Balance \$	
Savings Accounts	#	Bank	Balance \$	
	#	Bank	Balance \$	
	#	Bank	Balance \$	
Trust Account	#	Bank	Balance \$	
Certificates of Deposit (CD)	#	Bank	Balance \$	
	#	Bank	Balance \$	
	#	Bank	Balance \$	
	#	Bank	Balance \$	
Credit Union	#	Bank	Balance \$	
	#	Bank	Balance \$	
Savings Bonds	#	Maturity Date	Value \$	
	#	Maturity Date	Value \$	
	#	Maturity Date	Value \$	
Retirement Accounts (401k, 403b, IRA, etc)	#	Administrator	Value \$	
	#	Administrator	Value \$	
	#	Administrator	Value \$	
Whole Life Insurance	#		Cash Value \$	
Whole Life Insurance	#		Cash Value \$	
Mutual Funds	Name:	#Shares:	Interest or Dividend \$	Value \$
	Name:	#Shares:	Interest or Dividend \$	Value \$
	Name:	#Shares:	Interest or Dividend \$	Value \$
Stocks	Name:	#Shares:	Dividend Paid \$	Value \$
	Name:	#Shares:	Dividend Paid \$	Value \$
	Name:	#Shares:	Dividend Paid \$	Value \$
Bonds	Name:	#Shares:	Interest or Dividend \$	Value \$
Investment Property				Appraised Value \$



Real Estate Property: <b>Do you own any property?</b>	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If yes, Type of property:</b>	
Location of property:	
Appraised Market Value	\$
Mortgage or outstanding loans balance due	\$
Amount of annual insurance premium	\$
Amount of most recent tax bill	\$

Have you sold/disposed of any property in the last 2 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If yes, Type of property</b>	
Market value when sold/disposed	\$
Amount sold/disposed for	\$
Date of transaction	

Have you disposed of any other assets in the last 2 years (Example: given away money to relatives, set up Irrevocable Trust Accounts, etc.)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If yes, describe the asset</b>	
Date of disposition	
Amount disposed	\$

Do you have any other assets not listed above (excluding personal property)?	<input type="checkbox"/> Yes <input type="checkbox"/> No
<b>If yes, please list:</b>	

### G. REFERENCE INFORMATION

Current Landlord	Name:			
	Address:			
	Home Phone:		Bus. Phone:	
	Dates of Tenancy:			
Prior Landlord	Name:			
	Address:			
	Home Phone:		Bus. Phone:	
	Dates of Tenancy:			
Prior Landlord	Name:			
	Address:			
	Home Phone:		Bus. Phone:	
	Dates of Tenancy:			



Credit Reference #1:	
Address:	
Account #:	Phone #:
Credit Reference #2:	
Address:	
Account #:	Phone #:
Personal Reference #1:	
Address:	
Relationship:	Phone #:
Personal Reference #2:	
Address:	
Relationship:	Phone #:

In case of emergency notify:	
Name:	Address:
Relationship:	Phone #:

<b>H. DEMOGRAPHIC INFORMATION (Optional)</b>		
These are optional questions, but are important for fair housing purposes. Please indicate appropriate category. Thank you.		
<b>Ethnicity of Head of Household # _____</b>		
1. Hispanic	2. Non-Hispanic	3. Declined to Report
<b>Race of Head of Household # _____</b>		
1. American Indian or Alaskan Native	3. African American	5. Other
2. Asian or Pacific Islander	4. Caucasian	6. Declined to Report

<b>I. VEHICLE AND PET INFORMATION (if applicable)</b>			
List any cars, trucks, or other vehicles owned. Parking will be provided for one vehicle. Arrangements with Management will be necessary for more than one vehicle.			
Type of Vehicle:	License Plate #:		
Year/Make:	Color:		
Type of Vehicle:	License Plate #:		
Year/Make:	Color:		
Is a pet a member of your family?		Yes	No
<b>If yes, describe:</b>			





**J. OTHER INFORMATION**

Community Eligibility

Elderly and/or Disability (where applicable): For some applicable HUD-regulated communities, we are required by HUD to request the following information for the purpose of determining eligibility for admission and/or to give special considerations with regard to allowances in determining rent. Please check the box or boxes that apply.

Head of Household, Spouse or Co-head is:

{  } 62 Years of age or older

{  } Disabled

Enterprise Income Verification (EIV) System Notification (If Applicable)

HUD's EIV System enables this community to cross reference resident-reported benefits and wage income to ensure the integrity of income and rent calculations. Please initial here that you have read this Notification. If you have any questions, you are encouraged to ask the management staff.

HOH Initials: \_\_\_\_\_ Co-Resident Initials: \_\_\_\_\_ Co-Resident Initials: \_\_\_\_\_

Federally Assisted Housing Requirement per 24 C.F.R. Part 5 Section 5.856

Federal regulations prohibit the admission to federally assisted housing of persons with a lifetime registration requirement under a state sex offender registration program.

- Do you have a registration requirement under a state sex offender registration program? \_\_\_\_\_
- If so, in what state? \_\_\_\_\_
- Is the registration requirement a lifetime requirement? \_\_\_\_\_

Implementation of the Violence Against Women and Justice Department Reauthorization Act of 2005

Are you a victim of domestic violence, dating violence or stalking?  Yes  No

If yes, please complete the Certification of Domestic Violence, Dating Violence or Stalking form (HUD-91066) which will be provided by the management staff upon request.



## CERTIFICATION

I/We hereby certify that I/We Do/Will Not maintain a separate subsidized apartment home in another location. I/We further certify that this will be my/our permanent residence. I/We understand I/We must pay a security deposit for this apartment prior to occupancy. I/We understand that my/our eligibility for housing will be based on applicable income limits and by management's selection criteria. I/We certify that all information in this application is true to the best of my/our knowledge and I/We understand that false statements or information are punishable by law and will lead to cancellation of this application or termination of tenancy after occupancy. All adult applicants, 18 or older, must sign application.

In consideration for being permitted to apply for this apartment, I Applicant, do represent all information in this application to be true and that the owner/manager/employee/agent may rely on this information when investigating and accepting this Rental Application. Applicant hereby authorizes the owner/manager/agent to make independent investigations to determine my credit, financial standing, criminal background, including sex offender registration history, and character standing. Applicant authorizes any person, or background checking agency having any information on him/her to release any and all information to the owner/manager/employee or their agents or background checking agencies. Applicant hereby releases, remises and forever discharges, from any action whatsoever, in law and equity, and all owners, managers and employees or agents, both of landlord and their credit checking agencies in connection with processing, investigating, or credit checking this application, and will hold harmless from any suit or reprisal whatsoever.

Beacon Residential Management Limited Partnership, Agent for this community, does not discriminate on the basis of race, color, religion, sex, national origin, familial status, physical or mental disability, ancestry, marital status, sexual orientation, age (except minors) or lawful source of income in the access or admission to its programs or employment, or in its programs, activities, functions or services.

\_\_\_\_\_

(Signature of Resident)

\_\_\_\_\_

Date

\_\_\_\_\_

(Signature of Co-Resident)

\_\_\_\_\_

Date

\_\_\_\_\_

(Signature of Co-Resident)

\_\_\_\_\_

Date

\_\_\_\_\_

(Signature of Management Representative)

\_\_\_\_\_

Date

### **PENALTIES FOR MISUSING THIS CONSENT:**

Title 18, Section 1001 of the U.S. Code states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department of the United States Government. HUD and any owner (or any employee of HUD or the owner) may be subject to penalties for unauthorized disclosures or improper use of information collected based on the consent form. Use of the information collected based on this verification form is restricted to the purposes cited above. Any person who knowingly or willingly requests, obtains or discloses any information under false pretenses concerning an applicant or participant may be subject to a misdemeanor and fined not more than \$5,000. Any applicant or participant affected by negligent disclosure of information may bring civil action for damages, and seek other relief, as may be appropriate, against the officer or employee of HUD or the owner responsible for the unauthorized disclosure or improper use. Penalty provisions for misusing the social security number are contained in the Social Security Act at 208 (a) (6), (7) and (8). Violation of these provisions are cited as violations of 42 U.S.C. 408 (a) (6), (7) and (8).



**RENTAL APPLICATION  
(Affordable Programs) -- Continued**

**OPTIONAL QUESTIONS TO ASCERTAIN IF AN  
APPLICANT IS ELIGIBLE FOR PRIORITY STATUS  
PLEASE INDICATE YES OR NO TO EACH QUESTION**

**1st Priority:** Are you Homelessness due to Displacement by Natural Forces: An applicant, otherwise eligible and qualified, who has been displaced by:

- (i) fire not due to the negligence or intentional act of applicant or a household member;
- (ii) earthquake, flood or other natural cause; or
- (iii) a disaster declared or otherwise formally recognized under disaster relief laws.

YES \_\_\_\_\_ No \_\_\_\_\_

**2nd Priority:** Are you Homelessness due to Displacement by Public Action (Urban Renewal): An applicant, otherwise eligible and qualified, who will be displaced within 90 days, or has been displaced within the three years prior to application, by:

- (i) any low rent housing project as defined in M.G. L. c. 121B, § 1, or
- (ii) a public slum clearance or urban renewal project initiated after January 1, 1947, or
- (iii) other public improvement.

YES \_\_\_\_\_ No \_\_\_\_\_

**3rd Priority :** Are you Homelessness due to Displacement by Public Action (Sanitary Code Violations): An applicant, othwise eligible and qualified, who is being displaced, or has been displaced within 90 days prior to application, by enforcement of minimum standards of fitness for human habitation established by the State Sanitary Code or local ordinances, provided that:

- (i) neither the applicant nor a household member has caused or substantially contributed to the cause of enforcement proceedings; and
- (ii) the applicant has pursued available ways to remedy the situation by seeking assistance through the courts or appropriate administrative or enforcement agencies.

YES \_\_\_\_\_ No \_\_\_\_\_

Note: For purposes of this subsection, “enforcement” is interpreted as a formal condemnation of the apartment. Citation for code violations does not, without more, constitute a condemnation.



**4th Priority:** Are you Involuntary Displaced by Domestic Violence: “Domestic Violence” as defined in M.G.L. c. 209A means actual or threatened physical violence directed against one or more members of the applicant’s family by a spouse or other member of the applicant’s household. An applicant is involuntarily displaced by domestic violence if:

- (i) The applicant has vacated a housing unit because of domestic violence; or
- (ii) The applicant lives in a housing unit with a person who engages in domestic violence.

YES \_\_\_\_\_ No \_\_\_\_\_

If the applicant is still living in the housing unit with a person who engages in domestic violence at the time of selection, the violence must have occurred within six months or be of a continuing nature.

Priority for Involuntary Displacement by Domestic Violence applies only to households with one or more children under the age of 18.

**Head of household must initial verifying the Priority status selection here:**

\_\_\_\_\_  
**(initial above)**

“Please note that effective August 1, 2015, there will be a change in our policy. Mansfield Meadows will become a “smoke-free” community. What does that mean? That means that all apartments, hallways, stairways, common areas, clubhouses, fitness centers, computer learning centers, pools and recreational areas, parking lots and driveways will be smoke-free. Smoking will not be allowed on, or in, this Beacon community. This policy does not mean “no smokers, it means “no smoking”. Smokers and non-smokers alike are welcome to apply and live in a Beacon community where we promote LIVING WELL by DESIGN®.”



## VERIFICATION OF LANDLORD HISTORY

**ALL APPLICANTS: PLEASE SIGN 2<sup>ND</sup> PAGE ONLY.  
FORM TO BE FILLED IN BY LEASING TEAM.**

DATE: \_\_\_\_\_

TO: \_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

FROM: Mansfield Meadows  
12 Bonney Lane  
Mansfield, MA 02048  
**PH: 508-339-3357**

SUBJECT: Verification of Information Supplied by the Applicant Shown Below for Housing Assistance

NAME \_\_\_\_\_  
SSN \_\_\_\_\_  
ADDRESS \_\_\_\_\_  
\_\_\_\_\_

This person has applied for housing assistance under a program of the U.S. Department of Housing and Urban Development (HUD). HUD requires the housing owner to verify all information that is used in determining this person's eligibility or level of benefits.

We ask your cooperation in providing the following information and returning it to the Property Manager of the property shown at the top of this form. Your prompt return of this information will help to assure timely processing of the application for assistance. Enclosed is a self-addressed, stamped envelop for this purpose. The applicant/resident has consented to this release of information as shown here.

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### **INFORMATION BEING REQUESTED BY LANDLORD/PREVIOUS LANDLORD**

1. How long did the referenced applicant reside at this address?
2. How many bedrooms? \_\_\_\_\_; how many persons lived in the unit? \_\_\_\_\_
3. What was the monthly rent? \$\_\_\_\_\_. Please circle which utilities were included in the monthly rent: Gas/Electric/Water
4. Was the applicant ever late in the payment of the monthly rent? \_\_\_\_\_? If yes, and after the 5<sup>th</sup> day of the month, how many times was the applicant late over the past twelve (12) months?  
\_\_\_\_\_
5. What living conditions did the applicant maintain? Please check.  
\_\_\_\_\_ Acceptable housekeeping (safe and sanitary)  
\_\_\_\_\_ Unacceptable housekeeping. Please describe:  
\_\_\_\_\_  
\_\_\_\_\_
6. Was the applicant destructive to the apartment/home or the surrounding public areas?  
\_\_\_\_\_. If yes, please explain:  
\_\_\_\_\_



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7. Did you receive any resident complaints in reference to the applicant? \_\_\_\_\_.  
If yes, please explain:

---

8. Did the applicant give a proper vacate notice? \_\_\_\_\_. What was the reason given for vacating?

---

9. Would you re-rent to the applicant in the future? \_\_\_\_\_ If not, why:

---

10. Additional Comments:

---

Print Name and Title of Person  
Supplying the Information

---

Name of Agency/Organization

---

Signature of Person  
Supplying the Information

---

Date

---

Telephone Number with Area Code

---

YOU DO NOT HAVE TO SIGN THIS FORM IF EITHER THE REQUESTING ORGANIZATION OR THE ORGANIZATION SUPPLYING THE INFORMATION IS LEFT BLANK.

**RELEASE I hereby authorize the release of the requested information.**

---

**Signature of Applicant**

---

**Date**

**PENALTIES FOR MISUSING THIS CONSENT:**

Title 18, Section 1001 of the U.S. Code states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department of the United States Government. HUD and any owner (or any employee of HUD or the owner) may be subject to penalties for unauthorized disclosures or improper use of information collected based on the consent form. Use of the information collected based on this verification form is restricted to the purposes cited above. Any person who knowingly or willingly requests, obtains or discloses any information under false pretenses concerning an applicant or participant may be subject to a misdemeanor and fined not more than \$5,000. Any applicant or participant affected by negligent disclosure of information may bring civil action for damages, and seek other relief, as may be appropriate, against the officer or employee of HUD or the owner responsible for the unauthorized disclosure or improper use. Penalty provisions for misusing the social security number are contained in the Social Security Act at 208 (a) (6), (7) and (8). Violation of these provisions are cited as violations of 42 U.S.C. 408 (a) (6), (7) and (8).



**Do Not Write Below this LINE – MANAGEMENT USE ONLY**

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**Application Processing**

Approved: \_\_\_\_\_ Approved by: \_\_\_\_\_ Waitlist(s): \_\_\_\_\_  
Date Signature Title

Disapproved: \_\_\_\_\_ Disapproved by: \_\_\_\_\_ Reason: \_\_\_\_\_  
Date Signature Title

Applicant notified in writing on (date): \_\_\_\_\_ (written notification attached)

**Appeal Processing**

Applicant appealed decision on (date): \_\_\_\_\_ (written notification attached)

Applicant notified of informal conference on (date) \_\_\_\_\_ by \_\_\_\_\_  
(written notification attached)

Applicant appeal reviewed by: \_\_\_\_\_  
Signature Title Date

Appeal decision: \_\_\_\_\_ Approved \_\_\_\_\_ Disapproved

Applicant notified in writing on (date) \_\_\_\_\_ (written notification attached)



## Document List for Interview

**All occupants aged 18 years and older must attend interview.** Please bring the following information that pertains to you and your household to the appointment.

**EMPLOYMENT INCOME** - For every member of your family over 18 years of age who works bring the following information and/or documents.

- Current pay stubs (at least 4 consecutive)
- Name, address, telephone number of employer
- *Current rate of regular pay and overtime pay and the number of hours per week normally worked.*
- Information about any changes you expect in your pay or the number of hours to be worked during the next twelve months.
- Other types of income you expect to receive from employment, such as tips, commissions, profit sharing programs, etc.

**SELF-EMPLOYMENT INCOME** - Please bring a copy of last year's executed tax return including Schedule C. Also bring a current financial statement, accountant's statement of Net Business Income (projected for the next 12 months), income receipts, or any documentation you can provide to corroborate income projections for the next 12 months.

**BENEFIT AND SUPPORT INCOME** - If any member of your family receives any of the following types of income, please bring the following information: source of income including name, address and telephone number, amount received and/or written verification of this income:

- Unemployment Compensation
- Social Security - (please call 1-800-772-1213 or access [www.ssa.gov](http://www.ssa.gov) to request an award letter)
- Supplemental Social Security
- Pension- provide most recent statement or check stub for all family members receiving a pension.
- Disability Income
- Alimony/Child Support (copy of support order and/or divorce decree, documentation from court, notarized letter from payee or printout from Mass DOR (applicant can receive a one year print-out of any income they have received from this source))
- Welfare or other public assistance
- Regular support from family members or friends





Requested Interview Information  
Page 2

**SAVINGS ACCOUNTS** - (including Christmas clubs, Certificates of Deposits, IRA and Keogh Accounts) and **CHECKING ACCOUNTS**

- Bring in current statement or passbook for each.

**RETIREMENT ACCOUNTS, INCLUDING 401K** - Please bring most recent statement and name and address of plan administrator

**WHOLE LIFE INSURANCE** - Please bring copy of policy and a recent statement.

**REAL ESTATE YOU OWN** - Please bring information about the current value of the property. If you own property and rent it, bring the address of the property and the information about how much income you receive and what expenses you have for the property. (Bring last year's Schedule E from your income tax forms.)

**STOCKS, BONDS, TRUSTS OTHER INVESTMENTS** - Please bring account numbers and statements of value on investments and information about income from investments.

**OTHER INCOME** - For all other types of income, please bring the name, address and telephone number of the source of the income and information about the amount of the income.

**ASSETS DISPOSED** - If you have sold or given away any assets in the past two years (such as giving a property or an amount of money to another family member), please bring information about those assets as well.

**OTHER INFORMATION**

- Last year's tax return and attachments (and most recent W-2s and 1099s) if you file taxes
- Proof of age for all household members (e.g. birth certificates) – for Annual Recertification, bring when adding household members only
- Social Security cards of all members in the household or Passport, VISA or Alien Registration ID for Annual Recertification, bring when adding household members only
- Student Status information for full-time students. Student income (grants, scholarships, etc.) for all students (exceptions apply)

