

Don't staple the pages of this application together!

1. Some providers *scan* the application, and if you staple, that means removing staples from 1000 applications every week or month.
2. If you include a letter, don't staple that either: providers need to quickly get to your waitlist data and your cover page just gets in the way.

Use #10 double window envelopes. Fold on the line, and addresses will fit in the windows.

Dear

I am applying to the following waitlist, which I believe is open:

App Generated:

### Housing Authority or Management Office Only

**Is this waitlist closed? Any other questions or concerns?** *Fill in the appropriate circle(s) below and fax this page to HousingWorks at the number below – and we will correct the problem. Hundreds of thousands of applicants check our free website to see what lists are open! Keeping us updated will save you many phone calls, reduces frivolous applications - and takes only 10 minutes a year.*

☐ **This particular waitlist is closed: The only open waitlists we have at present are:**

\_\_\_\_\_

☐ **This is not the correct application. The correct application is available by/from:**

\_\_\_\_\_

☐ **Any other info you wish to tell HousingWorks?**

\_\_\_\_\_

**Your position or title at this housing program:** \_\_\_\_\_

**Your signature:** \_\_\_\_\_

HousingWorks Fax: 617-536-8561



|   |                                 |
|---|---------------------------------|
| ○ | Head of Household's FIRST Name  |
|   | Head of Household's MIDDLE Name |
|   | Head of Household's LAST Name   |

|                              |  |        |                     |
|------------------------------|--|--------|---------------------|
| HoH's SOCIAL SECURITY NUMBER |  | GENDER | HoH's DATE OF BIRTH |
| ○                            |  | ○      |                     |

|   |   |
|---|---|
| ETHNICITY<br>Also provide your race at right! | RACE: Asian , Black, White, Native American, Pacific Islander, Multi-racial<br>Do <b><u>NOT</u></b> write Spanish, Hispanic, Latino here – and do <b><u>NOT</u></b> write your country! |
| ○   | ○   |

|                             |
|-----------------------------|
| ○ YOUR MOTHER'S MAIDEN NAME |
|-----------------------------|

|                     |                  |
|---------------------|------------------|
| YOUR HOME TELEPHONE | SECOND TELEPHONE |
| ○                   |                  |
| YOUR EMAIL ADDRESS  |                  |
| ○                   |                  |

|   |
|---|
| CURRENT ADDRESS <u>OR</u> LONG-TERM CONTACT ADDRESS |
| This is:  |
| ○   |
| ○   |

|                        |
|------------------------|
| SECOND CONTACT ADDRESS |
| This is:               |
| ○                      |
| ○                      |

|                      |          |            |            |  |
|----------------------|----------|------------|------------|--|
| TOTAL HOUSEHOLD SIZE |          |            | # BEDROOMS | How much money does your family receive in a year? |
| ○                    | # Adults | # Children | Total #    | ○  |
|                      |          |            |            | .0 0   |

|                |
|----------------|
| INCOME SOURCES |
| ○              |

|                                  |
|----------------------------------|
| MOBILE RENTAL ASSISTANCE, if any |
| ○                                |

|                          |
|--------------------------|
| REQUESTED ACCOMMODATIONS |
| ○                        |

|  |
|--|
| SPECIAL CIRCUMSTANCES THAT <u>SOME</u> PROGRAMS MAY USE TO ASSIGN PRIORITY OR PREFERENCE |
| ○  |



*your resource for Affordable Housing*



**Berry Farms  
North Andover, MA**

Language assistance will be available by appointment. Call 978-456-8388

Attached is the information regarding the affordable rental units at Berry Farms in North Andover, Massachusetts. Potential Tenants will not be discriminated against on the basis of race, color, national origin, disability, age, ancestry, children, familial status, genetic information, marital status, public assistance reciprocity, religion, sex, sexual orientation, gender identity, veteran/military status, or any other basis prohibited by law.

Located on Berry Street in North Andover, Berry Farms is a new development offering 49 affordable one, two and three bedroom apartments for eligible tenants. Surface parking is available for all tenants in the designated tenant parking area at no charge. In unit washer and dryers are included. Pets are allowed for an additional monthly fee. A community building is part of the development and will include a fitness center, wifi café, great room. There is a pool as well as walking trails, Dog Park and 24 hour maintenance staff.

The monthly rent is: One Bedroom - \$1,084; Two Bedroom - \$1,287; Three Bedroom - \$1,472, utilities are not included. A utility allowance has been deducted from the rent, when appropriate. Water and Sewer are included in the rent. All affordable units will be distributed by lottery as outlined in the attached package. Please review the enclosed information packet in detail and complete the application and disclosure statement at the rear of the packet.

The rents are NOT income based or subsidized. Tenant is responsible for the full rent as stated above. Section 8 will be accepted and it is your responsibility to verify with your Housing Authority or whomever issues your Section 8 voucher that they will accept the rents prior to application. The minimum gross income, without a Section 8 Voucher, to lease at Berry Farms is: one bedroom - \$32,520; two bedrooms - \$38,610; three bedrooms - \$44,160.

***Please note: Complete financial documentation is required and must be sent with your application to participate in the lottery. Included in this package is the list of required to be sent in with your application. Applications will be logged in at time of receipt and will be reviewed after the application deadline. Incomplete applications will not be included in the lottery and the applicant will be notified after the application deadline.***

A Public Information Meeting will be held to answer specific questions and provide an overview of the lottery process. The meeting is scheduled for 6:30 p.m., Monday, August 15, 2016 at the Stevens Memorial Library located at 345 Main Street in N. Andover, MA. If you have questions and can attend this meeting, please hold them until that time.

The application deadline is September 10, 2016. You must have submitted a complete application postmarked on or before September 10th to be in the lottery. The lottery is scheduled for 6:30 p.m., Monday, October 3, 2016 at the Stevens Memorial Library.

Thank you for your interest in affordable housing at **BERRY FARMS**. If you have any questions, please contact MCO Housing Services at 978-456-8388 or email us at [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com).

This is an important notice. Please have it translated.  
Este é um aviso importante. Quem mandou-lo traduzir.  
Este es un aviso importante. Sírvase mandarlo traducir.  
ĐÂY LÀ MỘT BẢN THÔNG CÁO QUAN TRỌNG  
XIN YUÌ LÒNG CHO DỊCH LẠI THÔNG CÁO ẤY  
Ceci est important. Veuillez faire traduire.

本通知很重要。請將之譯成中文。  
នេះគឺជាការដឹងដូច្នេះ សូមបញ្ជូនបកប្រែជូនផង

Это очень важное сообщение. Пожалуйста переведите

Sincerely,

*Maureen M. O'Hagan*

Maureen M. O'Hagan



**Berry Farms**  
Question & Answer

The units will be leased in accordance with policies and guidelines established by the Commonwealth of Massachusetts Department of Housing and Community Development (DHCD) and MassHousing.

**What are the qualifications required for Prospective Tenants?**

- Qualify based on the following maximum income table, which is adjusted for household size:

| Household Size       | 1        | 2        | 3        | 4        | 5        | 6        |
|----------------------|----------|----------|----------|----------|----------|----------|
| Max Allowable Income | \$46,000 | \$52,600 | \$59,150 | \$65,700 | \$71,000 | \$76,250 |

**LOTTERY APPLICANT QUALIFICATIONS:**

1. Household income cannot exceed the above maximum gross allowable income limits.
2. When assets total \$5,000 or less, the actual income received is included in the annual income as income from assets OR when assets exceed \$5,000, annual income includes the greater of actual income from assets or a .06% imputed income calculation. Included in this package is the List of Required Financial Documentation.
3. In addition to income and asset eligibility you will also be subject to a screening by the project and determined eligible based on that basis.
4. Potentials tenants may not own another home. The affordable unit must be their principal, full-time residence.

**Is there Local Preference?**

Yes, 34 of the units are for applicants that meet at least one of the Local Preference Criteria as stated the application.

**Are there preferences for Household Size?**

In all cases, preference for the one bedroom unit will be for households that require one bedroom. Preference for the two bedrooms will be for households requiring two bedrooms and preference for the three bedroom units will be for households requiring three bedrooms.

Unit size preferences are based on the following:

- a. There is a least one occupant per bedroom.
- b. A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom. Other household members may share but shall not be required to share a bedroom.
- c. A person described in the first sentence of (b) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
- d. A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
- e. If the applicant is in the process of a divorce or separation, the applicant must provide proof that the divorces or separation has begun or has been finalized, as set forth in the application.

Persons with disabilities are entitled to request a reasonable accommodation of rules, policies, practices, or services or to request a reasonable modification of the housing, when such accommodations or modifications are necessary to afford the person(s) with disabilities equal opportunity to use and enjoy the housing.

**What happens if my household income exceeds the income limit?**

Annually you will be recertified for eligibility. Once your household income exceeds 140% of the maximum household allowable income, then after the end of your current lease you will have the option of staying in your unit and paying the market rent or not renewing your lease.



## Lottery Process

Due to the nature of the affordable units' availability it is important for everyone to understand the procedure. Please understand the allowable income guidelines are adjusted based upon your household size. Also be advised that the program and its requirements are subject to changes in local, state or federal regulations.

## Lottery Pools

Forty-nine affordable units are available by lottery at Berry Farms. The lottery has three pools; Local, Open and Disabled. The unit breakdown as follows:

| Unit Size     | # of Units | Local Pool | Open Pool | Accessible              |
|---------------|------------|------------|-----------|-------------------------|
| One Bedroom   | 21         | 16         | 4         | 1 (Hearing Impaired)    |
| Two Bedroom   | 24         | 16         | 7         | 1 (Handicap Accessible) |
| Three Bedroom | 4          | 2          | 2         | 0                       |

All Local applicants are also included in the Open Pool. If there are no applicants that require a handicap unit then those units will be distributed through the Open Pool.

In all cases, preference for the three bedroom units will be for a household that requires three bedrooms, second preference for a household requiring two bedrooms, and final preference for a household requiring a one bedroom.

Preference for the two bedroom units will be for households requiring two bedrooms, second preference for applicants requiring one bedroom.

Preference for the one bedroom units will be for a household requiring one bedroom.

Household size preferences are based on the following:

- a. There is a least one occupant per bedroom.
- b. A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom. Other household members may share but shall not be required to share a bedroom.
- c. A person described in the first sentence of (b) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
- d. A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
- e. If the applicant is in the process of a divorce or separation, the applicant must provide proof that the divorces or separation has begun or has been finalized, as set forth in the application.

Persons with disabilities are entitled to request a reasonable accommodation of rules, policies, practices, or services or to request a reasonable modification of the housing, when such accommodations or modifications are necessary to afford the person(s) with disabilities equal opportunity to use and enjoy the housing.

All of the applicants for a given pool will be pulled at the time of the lottery. This will establish the rankings for the distribution of units. This means if you are a two person household and by the above definition require a one bedroom unit and are drawn first in the lottery, we will move to the first applicant on the list that meets the unit preference for the two bedroom unit. If we have gone through the list and have units remaining we will begin working from the top of the list and you may have an opportunity to lease.



### **Time Frames**

The first building will be available for immediate occupancy.

If you are selected and have the opportunity to lease a unit you will speak or meet with a representative to review your application to verify all information. Please be advised that the official income verification will be done at the time you have an opportunity to lease a unit. Also understand you need to be income and asset eligible but will also be subject to a credit screening by the project and determined eligible or ineligible on that basis.

### **Acceptance of Units**

It is important for all applicants to understand that specific units are attached to specific lottery rankings based upon the projected availability of the completed unit. Applicants will not have a choice of unit locations, style or schedules. You will not be able to “pass” on a unit and wait for another unit. If you choose not to take the designated unit, you will go to the bottom of the list and may not have another opportunity.

### **Summary**

We hope this helps explain the process by which the units will be distributed. It can be a lengthy and sometimes complicated process. We greatly appreciate your participation and wish you the best of luck in the lottery process.



## Unit Numbers

| Bldg # | Unit # | # of Beds |
|--------|--------|-----------|
| 1      | 1101   | 2         |
| 1      | 1105   | 1         |
| 1      | 1108   | 2         |
| 1      | 1109   | 1         |
| 1      | 1204   | 3         |
| 1      | 1206   | 1         |
| 1      | 1210   | 1         |
| 1      | 1213   | 2         |
| 1      | 1302   | 2         |
| 1      | 1303   | 2         |
| 1      | 1305   | 1HI       |
| 2      | 2102   | 2H        |
| 2      | 2109   | 1         |
| 2      | 2112   | 1         |
| 2      | 2115   | 2         |

|   |      |   |
|---|------|---|
| 2 | 2203 | 1 |
| 2 | 2204 | 3 |
| 2 | 2211 | 1 |
| 2 | 2212 | 1 |
| 2 | 2214 | 2 |
| 2 | 2302 | 2 |
| 2 | 2305 | 1 |
| 2 | 2306 | 1 |
| 2 | 2309 | 1 |
| 2 | 2405 | 1 |
| 2 | 2413 | 3 |
| 2 | 2416 | 2 |
| 3 | 3103 | 2 |
| 3 | 3105 | 1 |
| 3 | 3110 | 2 |
| 3 | 3114 | 2 |
| 3 | 3201 | 2 |

|   |      |   |
|---|------|---|
| 3 | 3203 | 2 |
| 3 | 3211 | 1 |
| 3 | 3302 | 2 |
| 3 | 3306 | 1 |
| 3 | 3307 | 2 |
| 4 | 4106 | 2 |
| 4 | 4108 | 1 |
| 4 | 4111 | 2 |
| 4 | 4202 | 2 |
| 4 | 4205 | 1 |
| 4 | 4209 | 3 |
| 4 | 4303 | 1 |
| 4 | 4307 | 1 |
| 4 | 4310 | 2 |
| 4 | 4312 | 2 |
| 4 | 4406 | 2 |
| 4 | 4411 | 2 |

**HI= Hearing Impaired Unit**

**H = Accessible Unit**

### UNIT SQUARE FOOTAGE

1 Bedroom Units: 806 – 951, depending on unit style  
 2 Bedroom Units: 1,146 – 1,122, depending on unit style  
 3 Bedroom units: 1,286 – 1,295, depending on unit style

### ESTIMATED BUILDING AVAILABILITY

Building 1 - June/July  
 Building 2 - August/September  
 Building 3 – October  
 Building 4 - November



# Berry Farms

## LOTTERY APPLICATION

Application Deadline: September 10, 2016

### For Office Use Only:

Date Appl. Rcvd: \_\_\_\_\_

Household Size: \_\_\_\_\_

Local: Y N

Lottery Code: \_\_\_\_\_

### PERSONAL INFORMATION:

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

Name: \_\_\_\_\_

Address: \_\_\_\_\_ Town: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_ Have you ever owned a home? \_\_\_\_ If so, when did you sell it? \_\_\_\_

Do you have a Section 8 Voucher? (These units are NOT subsidized.) \_\_\_\_ Yes \_\_\_\_ No

Do you require an handicap accessible unit? \_\_\_\_ Yes \_\_\_\_ No

Do you require a hearing impaired unit? \_\_\_\_ Yes \_\_\_\_ No

Bedroom Size (Check One): \_\_\_\_ One Bedroom; \_\_\_\_ Two Bedroom; \_\_\_\_ Three Bedroom

Local Preference: (Check all that apply) Proof of Local Preference will be required if you have the opportunity to lease.

\_\_\_\_ Current North Andover Resident

\_\_\_\_ Employed by the Town of North Andover

\_\_\_\_ Employee working for businesses located in the Town of North Andover

\_\_\_\_ Households whose children attend North Andover Schools, i.e. School Choice

FINANCIAL WORKSHEET: (Include all Household Income, which includes gross wages, retirement income (if drawing on it for income), business income, veterans' benefits, alimony/child support, unemployment compensation, social security, pension/disability income, supplemental second income and dividend income.)

Applicant Monthly Base Income (Gross) \_\_\_\_\_

Other Income, specify \_\_\_\_\_

Co-Applicant Monthly Base Income (Gross) \_\_\_\_\_

Other Income, specify \_\_\_\_\_

### TOTAL MONTHLY INCOME:

**Household Assets:** (This is a partial list of required assets. Complete all that apply with current account balances)

Checking (avg balance for 6 months) \_\_\_\_\_

Savings \_\_\_\_\_

Stocks, Bonds, Treasury Bills, CD or \_\_\_\_\_

Money Market Accounts and Mutual Funds \_\_\_\_\_

Individual Retirement, 401K and Keogh accounts \_\_\_\_\_

Retirement or Pension Funds (amt you can w/d w/o penalty) \_\_\_\_\_

Revocable trusts \_\_\_\_\_

Equity in rental property or other capital investments \_\_\_\_\_

Cash value of whole life or universal life insurance policies \_\_\_\_\_

### TOTAL ASSETS

(Please complete reverse side)

This is an important notice. Please have it translated.  
Este é um aviso importante. Quem mandou traduzir.  
Este es un aviso importante. Sírvase mandarlo traducir.  
ĐÂY LÀ MỘT BẢN THÔNG CÁO QUAN TRỌNG  
XIN VUI LÒNG CHO DỊCH LẠI THÔNG CÁO AÏ  
Ceci est important. Veuillez faire traduire.

本通知很重要。請將其譯成中文。

នេះគឺជាព័ត៌មាន ខ្លឹមសារសំខាន់ណាមួយ

ဒီဟာ သတိပေး စာမျက်နှာပါ။ ပိုမိုအရေးကြီးတဲ့ အချက်





**EMPLOYMENT STATUS: (include for all working household members. Attach separate sheet, if necessary.)**

Employer: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Date of Hire (Approximate): \_\_\_\_\_  
Annual Wage - Base: \_\_\_\_\_  
Additional: \_\_\_\_\_ (Bonus, Commission, Overtime, etc.)

**ABOUT YOUR HOUSEHOLD: (OPTIONAL)**

You are requested to fill out the following section in order to assist us in fulfilling affirmative action requirements. Please be advised that you should fill this out based upon family members that will be living in the apartment/unit. Please check the appropriate categories:

|                                     | Applicant | Co-Applicant | (#) of Dependents |
|-------------------------------------|-----------|--------------|-------------------|
| Non-Minority                        | _____     | _____        | _____             |
| Black or African American           | _____     | _____        | _____             |
| Hispanic or Latino                  | _____     | _____        | _____             |
| Asian                               | _____     | _____        | _____             |
| Native American or Alaskan Native   | _____     | _____        | _____             |
| Native Hawaiian or Pacific Islander | _____     | _____        | _____             |

The total household size is \_\_\_\_\_ (This is very important to determine the maximum allowable income for your household.)

**Household Composition (including applicant(s))**

|            |                    |           |            |                    |           |
|------------|--------------------|-----------|------------|--------------------|-----------|
| Name _____ | Relationship _____ | Age _____ | Name _____ | Relationship _____ | Age _____ |
| Name _____ | Relationship _____ | Age _____ | Name _____ | Relationship _____ | Age _____ |
| Name _____ | Relationship _____ | Age _____ | Name _____ | Relationship _____ | Age _____ |

**SIGNATURES:**

The undersigned warrants and represents that all statements herein are true. It is understood that the sole use of this application is to establish the preliminary requirements for placement into a lottery to have an opportunity to lease an affordable unit at Berry Farms. I (we) understand if selected all information provided shall be verified for accuracy at the time of lease.

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Applicant(s)

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Co-Applicant(s)

Based upon the preliminary information provided, it is my judgment that the applicant should be allowed to participate in the lottery for affordable units at Berry Farms. If selected all information provided shall be verified for accuracy at the time of lease.

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Certifying Agent (MCO Housing Services)

**Return with signed Affidavit & Disclosure Form, complete financial documentation and Release of Information to:**

**MCO Housing Services  
P.O. Box 372  
Harvard, MA 01451**



# Berry Farms

## Affidavit & Disclosure Form

I/We understand and agree to the following conditions and guidelines regarding the distribution of the affordable units at Berry Farms through the MassHousing 40B in North Andover, MA:

1. The gross annual household income for my family does not exceed the allowable limits as follows:

| Household Size       | 1        | 2        | 3        | 4        | 5        | 6        |
|----------------------|----------|----------|----------|----------|----------|----------|
| Max Allowable Income | \$46,000 | \$52,600 | \$59,150 | \$65,700 | \$71,000 | \$76,250 |

Income from all family members must be included.

2. I/We understand the calculation of income will include the higher of actual income from assets (if over \$5,000) or an imputation of .06% of the value of total household assets which is added to a household's income in determining eligibility.
3. The household size listed on the application form includes only and all the people that will be living in the residence.
4. I/We certify all data supplied on the application is true and accurate to the best of my/our knowledge and belief under full penalty of perjury. I/We understand that providing false information will result in disqualification from further consideration.
5. I/We understand that by being selected in the lottery does not guarantee that I/we will be able to lease a unit. I/We understand that all application data will be verified and additional financial information may be required, verified and reviewed in detail prior to leasing a unit. I/We also understand that the Project's Owner will also perform its own screening to determine our eligibility to lease.
6. I/We understand that if selected I/we will be offered a specific unit. I/We will have the option to accept the available unit, or to reject the available unit. If I/we reject the available unit I/we will move to the bottom of the waiting list and will likely not have another opportunity to lease an affordable unit at Berry Farms.
7. Program requirements are established by DHCD and MassHousing and are enforced by MassHousing. I/We agree to be bound by whatever program changes that may be imposed at any time throughout the process. If any program conflicts arise, I/we agree that any determination made by MassHousing is final.
8. I/We certify that no member of our family has a financial interest in Berry Farms.
9. I/We understand there may be differences between the market and affordable units and accept those differences.
10. I/We understand that if my/our total income exceeds 140% of the maximum allowable income at the time of annual eligibility determination, after the end of my then current lease term I will no longer be eligible for the affordable rent.

I/We have completed an application and have reviewed and understand the process that will be utilized to distribute the available units at Berry Farms. I/We am qualified based upon the program guidelines and agree to comply with applicable regulations.

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Co-Applicant

\_\_\_\_\_  
Date

**Please return with completed application and complete supporting financial documentation to:**

**MCO Housing Services  
P.O. Box 372  
Harvard, MA 01451**





**Berry Farms**  
**N. Andover, MA**

***Release of Information Authorization Form***

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

I/We hereby authorize MCO Housing Services, Berry Farms Leasing Office, North Andover Holdings LLC, or any of its assignees to verify any and all income, assets and other financial information, to verify any and all household, resident location and workplace information and directs any employer, landlord or financial institution to release any information to MCO Housing Services, Berry Farms Leasing Office, North Andover Holdings LLC, or any of its assignees and consequently the Projects Administrator, for the purpose of determining income eligibility for Berry Farms.

A photocopy of this authorization with my signature may be deemed to be used as a duplicate original.

\_\_\_\_\_  
Applicant Name (Please Print)

\_\_\_\_\_  
Applicant Name (Please Print)

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Applicant Signature

Mailing Address

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





## Required Personal Identification and Income Verification Documents TO BE RETURNED WITH APPLICATION

Provide one copy of all applicable information. Failure to provide complete information will prohibit you from participating in the lottery. If you have any questions please call, 978-456-8388.

Please check each that are applicable and write N/A if not applicable and return this sheet with your application.

1. \_\_\_\_ Identification for each household member, i.e. Social Security Card, Birth Certificate etc.
2. \_\_\_\_ Federal Tax Returns –2015 – NO STATE TAX RETURNS
3. \_\_\_\_ W2 and/or 1099-R Forms: 2015
4. \_\_\_\_ Five (5) **consecutive** pay stubs ending within one month of lottery application for all jobs (check/direct deposit stubs). For unemployment, copies of unemployment checks or DOR verification stating benefits received. Same for disability compensation, worker's compensation and/or severance pay.
5. \_\_\_\_ Full amount of periodic amounts received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
6. \_\_\_\_ Child support and alimony: court document indicating the payment amount.
7. \_\_\_\_ Interest, dividends and other net income of any kind from real or personal property.
8. Asset Statement(s): provide **current** statements of all that apply, unless otherwise noted:
  - \_\_\_\_ Checking accounts – **SIX (6)** months of statements – EVERY PAGE – FRONT AND BACK
  - \_\_\_\_ Pre-paid debit card statements - current statment
  - \_\_\_\_ Saving accounts – current statement
  - \_\_\_\_ Revocable trusts
  - \_\_\_\_ Equity in rental property or other capital investments
  - \_\_\_\_ Investment accounts, including stocks, bonds, Treasury Bills, Certificates of Deposit, Mutual Funds and Money Market Accounts including all individual retirement accounts, 401K, Keogh accounts and Retirement and Pension funds. – current statement
  - \_\_\_\_ Cash value of Whole Life or Universal Life Insurance Policy.
  - \_\_\_\_ Personal Property held as an Investment
  - \_\_\_\_ Lump-sum receipts or one-time receipts
9. \_\_\_\_ Proof of student status for dependent household members over age of 18 and full-time students.
10. \_\_\_\_ A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
11. \_\_\_\_ If the applicant is in the process of a divorce or separation, the applicant must provide legal proof that the divorce or separation has begun or has been finalized, as set forth in the application.
12. If you are self-employed you **MUST** provide a detail expense and income statement for the previous 12 months and three months of business checking and savings accounts.

Applicants Signature

DATE

Co-Applicants Signature

DATE

