

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 Also provide your race at right!	RACE: Asian , Black, White, Native American, Pacific Islander, Multi-racial 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
○

# Affordable Unit Application

## 37 Washington

### Melrose, MA

**Applications must be completed and received by 2 pm Sept 12<sup>th</sup>, 2016.**

MAXIMUM Household Income Limits:

\$51,150 (1 person), \$58,450 (2 people), \$65,750 (3 people), \$73,050 (4 people), \$78,900 (5 people) and \$84,750 (6 people)

Rents are \$1,333 to \$1,339 (1BR), \$1,486 (2BR) and \$1,614 (3BR) and do not include any utilities except water and sewer.

Households must make approximately \$39,990 to lease a 1BR unit, \$44,580 to lease a 2BR, and \$48,420 to lease a 3BR unit (please read Information Packet for details).

This is not subsidized housing. Rents do not change based on applicant's income and tenants will be responsible for paying the full rent themselves. Applicants with Section 8 Vouchers should contact their local housing authorities before applying.

Please read the Information Packet for more details.

### **Directions:**

This application consists of the following sections:

- 1) The Program Application and Definitions
- 2) Required Documentation Guide
- 3) Additional Forms *(if applicable)*

The first two sections must be filled out entirely in order for your application to be processed. Every space given to initial must be initialed, even if you answer "N/A". If a question does not apply to you, check "N/A". LEAVE NOTHING BLANK.

**You must include all income and asset documentation as directed with this application.**

Send or drop off all applications by the date at the top of this page to the following address. If faxing or emailing, please make sure that both sides of all double sided pages get transmitted.

SEB  
Re: 37 Washington  
165 Chestnut Hill Ave, Unit #2  
Brighton, MA 02135  
Fax: 617.782.4500  
Email: [seb.housing@gmail.com](mailto:seb.housing@gmail.com)



# Section 1

## The Program Application and Definitions

**Please provide all the following contact information for the Head of Household:**

Applicant's Name: \_\_\_\_\_

Address: \_\_\_\_\_

City/State : \_\_\_\_\_ Zip: \_\_\_\_\_

Home Phone: \_\_\_\_\_ Work Phone: \_\_\_\_\_

Cell Phone: \_\_\_\_\_ Employer: \_\_\_\_\_

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

*Please note: We will only use your email address to contact you about this application. Providing your email should facilitate the process of completing your application as you will be notified of missing documentation faster than if we can only send notifications via postal mail. We will not contact you about future lotteries unless requested.*

**Anticipated Move-In/Lease Renewal Date:** \_\_\_\_\_

**Bedroom Size Information:** For which bedroom size are you applying (you can select more than one)

- ☐ 1 bedroom  
☐ 2 bedroom  
☐ 3 bedroom

**Do you currently receive or do you have a Section 8 mobile voucher or certificate?** (The Lottery Agent does not discriminate based on source of income. This question is asked for the sole purpose of determining ability to pay rent.)

☐ Yes ☐ No

Please fill out the chart below for everyone who will be occupying the unit:

NAME A.	AGE B.	HEAD OF HOUSEHOLD OR DEPENDENT C.	RELATIONSHIP TO APPLICANT LISTED AT THE TOP OF THIS PAGE D.

**I certify that my Household Size is (total number of entries in column A) \_\_\_\_\_.**

**Initial(s):** \_\_\_\_\_

**Initial(s):** \_\_\_\_\_

**HOUSEHOLD TYPE** (please check one, read the Information Packet for more details):

Type A

- ☐ 6 person household: all types
- ☐ 5 person household: all types
- ☐ 4 person household: all types
- ☐ 3 person household: 1 head-of-household plus 2 dependents
- ☐ 3 person household: 2 heads-of-household plus one dependent, where heads of household *cannot be required to share a bedroom as a consequence of sharing would be a severe adverse impact on his or her mental or physical health*

Type B

- ☐ 3 person household: 2 heads-of-household plus 1 dependent
- ☐ 2 person household: 2 heads-of-household *who cannot be required to share a bedroom as a consequence of sharing would be a severe adverse impact on his or her mental or physical health*
- ☐ 2 person household: 1 head-of-household plus one dependent

Type C

- ☐ 2 person household: 2 heads-of-household
- ☐ 1 person household: all types

**PREFERENCE INFORMATION**

**Are you, or any member of your household, in need of an accessible unit?** This is defined as persons with a physical disability that meet standards established by the Department of Housing and Community Development and state laws for disabled accessible housing and who needs the features of a disabled-accessible unit.

- ☐ Yes
- ☐ No

*If yes, in Section 2: Preferences, you will be required to attach documentation as directed.*

**Do you or any member of your household qualify for Local Preference?** An applicant qualifies for local preference if the applicant or a member of their household fit into one of the following categories (A) a current resident of Melrose or (B) an employee of a business or entity located in Melrose

- ☐ Yes
- ☐ No

*If yes, in Section 2: Preferences, you will be required to attach proof of local preference.*

**RACE: (OPTIONAL)**

Information will be used to determine effectiveness of affirmative outreach. Response is strictly voluntary and will not affect your application. (Please check all boxes that apply):

- |   |  |
|---|--|
| <input type="checkbox"/> Alaskan Native and Native American | <input type="checkbox"/> Asian                               |
| <input type="checkbox"/> Black or African American          | <input type="checkbox"/> Native Hawaiian or Pacific Islander |
| <input type="checkbox"/> Hispanic or Latino                 |  |
| <input type="checkbox"/> White (not of Hispanic origin)     | <input type="checkbox"/> Other (please specify) _____        |

**RELATED PARTY**

Is any member of the household related to or employed by the developer or related to or employed by the Property Management Company?

- ☐ Yes  
☐ No

If yes, please explain the relationship in the space provided here:

**DATABASE INFORMATION**

How did you find out about this affordable housing opportunity?  
(please be as specific as possible, if found "online" please provide web address)

**REASONABLE ACCOMODATION**

Persons with disabilities are entitled to request a reasonable accommodation in rules, policies, practices, or services, or to request a reasonable modification in the housing, when such accommodations or modifications may be necessary to afford persons with disabilities an equal opportunity to use and enjoy the housing.

Does any member of the household have any accessibility or reasonable accommodation requests or changes in a unit or development or alternative ways we need to communicate with you?

- ☐ Yes  
☐ No

If yes, please explain in the space provided here or write a signed statement and attach it:

## **INSTRUCTIONS FOR COMPLETING THE FOLLOWING INCOME TABLE**

Please complete the Income Table on the following two pages. You will later be asked to attach supporting documentation in the form of the **five most recent consecutive pay stubs and/or income statements for all sources of income, W-2 statements** and the **most recent federal income tax returns** (including all attachments and amendments) for each member of the household.

For the purpose of **income determination**, **"Household"** shall mean all persons whose names appear on the lease, and also all persons who intend to occupy the housing unit as their permanent primary residence, even if they are not included on the lease. Legally married couples shall both be considered part of the household, even if separated. The incomes of *all* household members will be included, with the exception of income from employment for household members under the age of 18 or any income over \$480/year of full-time students who are dependents (but please note that documentation of income for those dependents still needs to be supplied).

### **Please note:**

1. Gross income from current wages, salaries, tips, etc. is the full amount, before any deductions, and is the amount used to determine estimated current annualized income.
2. For self-employed applicants- include the contract or job name in the space provided. You will be directed to all the additional documentation you will need to submit in **Section 2**.
3. "Interest Income" refers to any amount that you receive from any asset except for amounts drawn down from a retirement account or 401K as those go on the lines for "pension" or "retirement funds".



# INCOME

Household Member Name	Source of Income	Current GROSS Monthly Income
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Employer (name)	
	Self-Employed (contract/job name)	
	Self-Employed (contract/job name)	
	Self-Employed (contract/job name)	
	Child Support/Alimony	
	Child Support/Alimony	
	Social Security Income	
	Social Security Income	
	Social Security Income	
	Social Security Income	
	SSDI	
	SSDI	
	Pension (list source)	
	Pension (list source)	
	Retirement Funds	

Household Member Name	Source of Income	Current GROSS Monthly Income
	Unemployment Compensation	
	Workman's Compensation	
	Severance Pay	
	Title IV/TANF	
	Full-Time Student Income (18 & Over Only)	
	Full-Time Student Income (18 & Over Only)	
	Periodic payments from family/friends & Recurring Gifts (i.e. rent assistance from family)	
	Interest Income (source)	
	Interest Income (source)	
	Interest Income (source)	
	Interest Income (source)	
	Interest Income (source)	
	Interest Income (source)	
	Other Income (name/source)	
	Other Income (name/source)	
	Gross Monthly Household Income (GMHI)	\$ /month
<b>GMHI x 12 =</b> Gross Annual Household Income      \$ /year		

## ASSETS

If a section doesn't apply, cross out or write NA. In the next section you will be directed to submit detailed bank/balance statements for EVERY ASSET listed here. If any household member has divested themselves of an asset for less than full and fair present cash value of the asset within two years prior to this application, the full and fair cash value of the asset at the time of its disposition must be listed below.

	Bank Name	Last 4 Digits of Acct Number	Amount	
<b>Checking Accounts</b>			Balance \$	
			Balance \$	
			Balance \$	
			Balance \$	
<b>Savings Accounts</b>			Balance \$	
			Balance \$	
			Balance \$	
			Balance \$	
<b>Trust Account</b>			Balance \$	
<b>Certificates (or CDs)</b>			Balance \$	
			Balance \$	
			Balance \$	
			Balance \$	
<b>Savings Bonds</b>	Maturity Date:		Value \$	
	Maturity Date:		Value \$	
<b>401k, IRA, Retirement Accounts (Net Cash Value)</b>	Company Name:		Value \$	
	Company Name:		Value \$	
	Company Name:		Value \$	
	Company Name:		Value \$	
<b>Mutual Funds</b>	Name:	# of Shares:	Interest/ Dividends	Value
			\$	\$
			\$	\$
			\$	\$
<b>Stocks</b>			\$	\$
			\$	\$
			\$	\$
<b>Bonds</b>			\$	\$
			\$	\$
<b>Investment Property</b>			Appraised Value \$	

## REAL ESTATE

Do you, or anyone on this application, own any property or have owned property (including in trust) in the past 2 years?	<input type="checkbox"/> Yes <input type="checkbox"/> No
Are you, or anyone on this application, entitled to receive any amount of money from the sale of any property? (currently or thru an upcoming court settlement)	<input type="checkbox"/> Yes <input type="checkbox"/> No
<i>If yes to either question, type of property:</i>	
Location of property:	\$
Appraised Market Value:	\$
Mortgage or outstanding loans balance due:	\$

# Section 2

## Required Documentation

**Please note: the following questions are applicable to every single person who will be occupying the unit. Therefore, the use of “I” or “my” in the following questions includes all household members.**

**You MUST initial every question in Section 2 and, where provided, check “N/A” or “Yes”.**

**Every time you answer “Yes”, you must submit all documentation as directed in that question.**

1. **Earnings/Wages (CURRENT EMPLOYMENT):** I have attached copies of the **five (5)** most recent consecutive pay stubs or five most recent statements for every source of income for every household member 18 years or older as listed on the Income Tables in Section1. All attached pay-stubs or statements have the name of the employer, date, wages, and name of the household member and cover the 5 most recent consecutive pay periods (*which will be a 5 week period if paid every week, or a 10 week period if paid every 2 weeks, or a 5 month period if paid only once each month*).

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

2. **Earnings (FORMER EMPLOYMENT):** For EACH AND EVERY source of income reported on the most recent tax return where a household member is no longer receiving income (e.g., no longer working for a particular employer), I have attached **one** of the following:

(A) A letter signed by that household member **and** a letter signed and dated from the former employer verifying the last day of income and the Year-To-Date income at time of separation OR

(B) Only for jobs where my last day of employment was in the previous calendar year, I have attached the last paystub from the job that shows a Year-To-Date income that matches the Wages on the W-2 for that job OR

(C) The Initial determination of unemployment benefit statement that lists former employers, length of employment, gross income by quarter, and EIN Number OR

(D) I have completed only the top portion of the Verification of Terminated Employment form attached in Section 3 of this application and understand that SEB will submit this to the contact provided by me on the form in hopes of having it returned in the next 1-2 weeks but in the event that the former employer does not return the form I will submit the materials listed in part A, B, C of this section

I understand proof of termination is required for every single job on my previous years tax returns (no matter how small), that this is to verify my current income and that being terminated from one or multiple jobs will in no way affect my affordable housing program eligibility.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

3. **Earnings (Social Security, SSDI, Pension, Retirement, Public Assistance, TANF):** I have attached copies of the most recent statements for every source of income listed on the line above for every household member 18 years or older. I understand that for Social Security and/or SSDI payments I need to submit the yearly benefit letter I receive from the Social Security Administration Office detailing my payments for the next 12 months.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

4. **Earnings (SELF EMPLOYED ONLY, INCLUDING UBER, LYFT, ETC, SEE BELOW):** For every self-employed household member 18 years or older, I have attached copies ALL of the following:
- (A) The most recent **two years' federal income tax returns** (including any attachments and amendments) AND
  - (B) A **year-to-date profit and loss statement** AND
  - (C) A **projected profit and loss statement** for the next 12 months AND
  - (D) All supporting documentation including current financial statements, accountant statements, quarterly tax returns (if I file quarterly), and income and expense receipts AND
  - (E) A **statement signed, dated and notarized by the self-employed household member summarizing the enclosed materials.**

I understand that if I have a job or earn any income that is part of the "Gig Economy," such as Uber, Lyft, TaskRabbit, etc., or any other type of limited independent contracting, I will have to provide all information and documentation listed above for Self Employed. This includes the Profit and Loss statements as well as documentation of your year to date income (i.e. income reports, ride totals, etc.). 1099 independent contractors are self-employed for tax and affordable housing purposes.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

5. **Earnings (Unemployment)** I have attached copies of the **three (3)** most recent consecutive unemployment statements for every household member 18 years or older who is currently receiving unemployment and understand that it must be assumed that the household member will continue to receive unemployment over the next 12 months. **For every household member who reported unemployment on their most recent tax return but who no longer receives it**, I have attached a copy of my current unemployment benefit statement or balance that was obtained online or at my unemployment office. The statement shows the last two unemployment payments received, my current benefit rate, and my current total benefit balance. I understand that if this documentation indicates that I have current benefits and have received recent payments, my unemployment will be calculated as part of my income, regardless of my current employment status.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

6. **Earnings (Workman's Comp, Severance pay)** I have attached copies of the **three (3)** most recent consecutive pay stubs or three most recent statements for payments I am receiving through Workman's Compensation or Severance settlement and if my current compensation or pay is not going to continue for the next 12 months, I have attached the legal document stating the monthly, yearly or total amount to which I am entitled in addition to the timeline and/or termination of such pay.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

7. **Household member with NO EARNINGS:** If a member of my household is 18 years or older and is not employed and not receiving any income, I have attached a letter from him/her attesting to this fact AND this letter has been signed and dated by that household member AND the letter has been notarized.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**8. Divorce and/or Separation:** I understand that legally married couples shall both be considered part of the household, even if separated, and that children can only be considered part of the household if a head of household has at least joint physical custody of the child and so I have attached a copy of my divorce decree AND the divorce agreement to verify my household size claims. I understand that if no legal action has been taken for filing for divorce or separation, my partner's income and asset must be included in my application.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**9. Child Support and/or Alimony:** If I am entitled to receive Child Support and/or alimony (even if I am not receiving it), I have attached **one** of the following:

- (A) A copy of my divorce decree or settlement agreement OR  
(B) A statement from the Department of Revenue (DOR) that shows my payments for the past 3 months OR  
(C) In the event that I am not receiving the child support or alimony I am entitled to receive, I have attached a copy of my divorce decree AND proof of a legal claim filed against the person that owes me money and, if applicable, DOR statements and/or legal claims showing payments made and/or owed.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**10. Periodic Payments:** If I am receiving any periodic payments, or listed anything under "Other Income", I have attached a signed and dated letter from the source of income that includes **ALL** of the following:

- (A) The Year-To-Date income received AND  
(B) The anticipated monthly income for the next 12 months AND  
(C) The letter has me listed as the recipient of the payments AND  
(D) The letter is notarized.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**11. Section 8 mobile voucher or certificate:** I have attached a copy of my completed and signed current voucher from the appropriate Housing Authority.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**12. Households with Students:** I have attached proof for every household member **18** years or older who is a full-time student of his/her full-time student status in the form of: Letter from the Registrar, Transcript or other enrollment verification.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

## **HOUSEHOLD ASSETS:**

Assets include but are not limited to the following: Checking or savings accounts, CDs, money market accounts, Treasury bills, stocks, bonds, securities, trust funds, gifts, pensions, IRAs, Keoghs, other retirement accounts, real estate, rental property, other real estate holdings, all property held as an investment, and safe deposit box contents (include the value). All accounts must include complete statements with all pages and list dividend and interest information if applicable *regardless of how little money may currently be in the account*.

13. I have completed the Asset Table in Section 1 and read the above paragraph on Household Assets and have attached every page of complete, detailed statements for the 3 most recent months or most recent complete quarterly statement on all assets held by each household member and all statements include information on interest, dividends, and gains or losses, if any.

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

14. **For EACH and EVERY DEPOSIT into EACH and EVERY checking and savings account, I have provided documentation from the source of the money deposited.** If a deposit is from earnings of any kind, I have followed all the directions in the applicable paragraphs on Earnings on the previous pages (i.e. submitted 5 most recent pay-stubs, verification from source of earnings etc). If a deposit is from child support and/or alimony, I have followed all the directions in the paragraphs on Child Support/Alimony on the previous pages. If a deposit is a periodic payment, repayment, gift, reimbursement, I have followed all the directions in the paragraph on the previous page titled "Periodic Payments". If a deposit is from a loan of any kind (including student loans), I have provided documentation showing the terms of the loan and the disbursement schedule. For any other deposit types, I have provided sufficient documentation of the purpose, frequency, amount and current status of these deposits from the source of payment. All written statements from third sources must be signed, dated and notarized.

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

15. **For every household member claiming to have NO ASSETS,** I have included a signed, dated, and notarized affidavit stating that the household member has no assets or accounts of any kind, including checking, savings, money market, trust, 401k, retirement, IRA, stocks, or any other type of account. If the household or household member has assets of any kind, they have followed the directions given in the two questions above.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

16. **For every household member who no longer owns an asset that generated income on the most recent tax return** (e.g., if a bank account was closed), I have attached a signed letter by the household member who formerly held that account AND either the final bank statement showing a zero balance or a signed and dated statement from the asset source attesting to this fact. **And for every household member who divested themselves of an asset for less than full and fair present cash value of the asset within two years prior to this application,** I have listed the full and fair cash value of the asset at the time of its disposition in the Asset Table AND provided the last statement for that asset showing its full market value AND attached a signed letter by the household member detailing the transaction in which they divested themselves of the asset.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_



**17. REAL ESTATE:** If I currently own property, I have attached documentation supporting the value of the property (such as a recent broker's opinion of the property or tax assessment or value as stated on a divorce decree or settlement statement) AND documentation showing my debt on the property (such as mortgage statements or foreclosure notices). I understand that if I have sold a home in the last calendar year in which taxes were filed, I must include the Closing Disclosure Form (formerly the HUD-1 form) Settlement statement for that sale. I understand that I cannot live in an affordable unit and own another home and, if my current home is under Purchase and Sale Agreement or being lost/sold through divorce, I may be entered onto a Waiting List for an affordable unit, but the home must be sold and a Closing Disclosure Form (formerly the HUD-1 form) Settlement statement provided or the divorce must be finalized prior to move-in or I will lose my position on the Waiting List.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**TAX DOCUMENTATION:**

**18.** I have attached all **W-2s, 1099s and all other tax documentation for all sources of income and assets.** I understand that W-2s are the tax documents that are given by employers to show wages, salaries and tips and 1099s are the tax documents that are given by other sources of income (ex: interest on savings accounts, income from retirement accounts, income from unemployment etc). These are the tax documents used so that 1040 taxes can properly be filed as detailed in the next question below. *(You will have a W-2 for every job worked in the most recent year you filed taxes. Please be sure that the wages in the W-2s you submit add up to the wages you filed on your 1040 tax form. If you are not currently working at any of the jobs for which you have received a W-2, please see Question 4: "Earnings (Former Employment)" on the first page of Section 2 for directions.)*

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**19. 1040 Tax Transcripts:** I have attached a computerized print out of the **most recent federal income tax returns (i.e. 1040 tax transcripts) including any and all schedules, attachments and amendments** for every household member 18 years or older. **Every page of the tax transcript must be sent** (including, if applicable, Schedules A, B, C etc ). I understand I can obtain these transcripts from the tax professional who filed my taxes last year or I can download these transcripts immediately for free by going to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by calling the IRS at [1.800.829.1040](tel:18008291040) and they will mail or fax the transcripts in 7-10 days. **For every household member who has not filed in the past 3 years,** I have attached a statement from the IRS showing "No Filing" for that household member **for each and every year** in the past three years when taxes were not filed. I understand I can call 1.800.829.1040 and the IRS will mail it or fax it to me in 7-10 days. I understand I can download these statements of no filing for the applicable year immediately for free by going to [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) or by calling the IRS at 1.800.829.1040 and they will mail or fax the statements in 7-10 days. I understand that when I visit [www.irs.gov/Individuals/Get-Transcript](http://www.irs.gov/Individuals/Get-Transcript) I will need to sign up for an account by providing an email address where the IRS can email me a verification code that can then be used to access my records, that I will need to answer a few security questions, and then my tax transcripts or statements of "No Filing" for the past 5 years will be available.

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**FINAL CERTIFICATION OF HOUSEHOLD INCOME:**

20. I certify that my combined **Gross Annual Household Income** is \$ \_\_\_\_\_  
(total on the bottom of the Income Table)

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

21. My **Gross Annual Household Income** listed above is greater than the Allowable Income Limits for our household size as specified on the cover page of this Program Application and I have therefore attached a signed and dated statement detailing why my income listed above does not reflect my income over the next 12 months AND have attached supporting documentation.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

22. There are planned changes in my household income over the next 12 months and I have therefore attached verification of these planned changes in income.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**PREFERENCES:**

23. **For Melrose Local Preference:** I certify that I/we qualify for Local Preference and have provided the required documentation. A household qualifies for Local Preference if the applicant or a member of their household fit into one of the following categories (A) a current resident of Melrose or (B) an employee of a business or entity located in Melrose.

Required Documentation:

If qualifying under definition (A) as detailed above: I have submitted a Copy of two (2) utility bills 1 from each utility company in my name dated within the last 60 days, e.g., (1) electric, (1) oil, (1) cable, (1) gas, or (1) telephone **landline (not cell phone)**. If utility bills cannot be provided the following documentation **must** be provided: current signed lease **AND** proof of voter registration from City of Melrose Election Department

If qualifying under definition (B) as detailed above: I have submitted copies of pay-stubs (these should already be submitted as directed in the **Earnings** section above) **AND IF THE PAY STUBS DO NOT SHOW THE ADDRESS OF THE JOB** I have submitted a **signed statement** from my employer on company letterhead the states the address of the job and the employees name.

☐ N/A

☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**24. Disabled Accessible Unit preference:** I certify that I am in need of an accessible unit AND I have attached supporting documentation. The supporting documentation must specify that I am in need of the features specific to disabled-accessible housing. Supporting documentation can be verification from a doctor or other medical professional, a peer support group, a non-medical service agency, or a reliable third party who is in a position to know about the individual's disability. Proof of receiving Social Security Disability Insurance benefits is also sufficient. Need of an accessible unit is defined as persons with a physical disability that meet standards established by the Department of Housing and Community Development and state laws for disabled housing.

- ☐ N/A  
☐ Not Interested  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**25. Household Type:** On page 4 for Household Type I stated that we have two household members who cannot be required to share a bedroom as a consequence of sharing would be a severe adverse impact on his or her mental or physical health and have attached supporting documentation. Supporting documentation can be verification from a doctor or other medical professional.

- ☐ N/A  
☐ Yes

Initial(s): \_\_\_\_\_

Initial(s): \_\_\_\_\_

**You must now read, sign and date the following page.**

**Please read each item below carefully before you sign.**

1. I hereby declare under pain and penalty of perjury that the information provided on every page of this application is true and correct. I understand that if any sources of income or assets are not disclosed on this application, or any information provided herein is not true and accurate, this application may be removed immediately from further consideration and I will no longer be allowed to reserve a unit.
2. I understand that this application will be incomplete if I do not sign and date this page and initial at all indicated points in the application.
3. The undersigned certify that none of the people listed in this application, or their families, have a financial interest in the development and none of the people listed in this application can be considered a Related Party by the affordable housing guidelines that govern this property.
4. The undersigned certify that the affordable unit will be undersigned's principal residence and the undersigned cannot own a home elsewhere or in trust while living in an affordable unit.
5. I understand that while previous years' tax transcripts and documentation are required, SEB LLC does not use income reported on the previous years' tax documentation to calculate current annualized income.
6. I understand that the lease or residency agreement for the units to be occupied through this affordable housing program may be subject to cancellation if any of the information above is not true and accurate.
7. I understand that this is a preliminary application and the information provided **does not** guarantee housing.
8. I understand that any material change in the income or assets of my household that occurs after the submission of this application may make me ineligible for affordable housing.
9. Co-signers and Guarantors **are not** permitted unless they are co-tenants who will reside in the unit.
10. I acknowledge that if my email address is provided in this application, SEB will correspond with me by email instead of postal mail unless I make a written request otherwise.
11. The undersigned give consent to the City of Melrose, SEB LLC, DHCD, The Hanover Company or their assigns to verify the information provided in this application.
12. The undersigned authorize the release of information necessary in determining income and assets from third-party references.

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Applicant's Signature

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Date

---

Applicant's Signature

---

Date

**Attach all documentation as directed. Send applications with ALL required documentation to:**

**SEB**

**Re: 37 Washington**

**165 Chestnut Hill Ave #2**

**Brighton, MA 02135**

**Fax: 617.782.4500**

**Email: seb.housing@gmail.com**

If you fax or email the application, **MAKE SURE THAT ALL DOUBLE SIDED PAGES GET TRANSMITTED!!!**

For Questions call (617) 782-6900

This development does not discriminate in the selection of applicants 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.

# Section 3

## Additional Forms *(if applicable)*

These are the forms that you only need to complete if directed to do so in Section 2

# Verification of Terminated Employment

## To Be Completed By Applicant:

Applicant/Tenant: \_\_\_\_\_

### Contact Info of previous employer:

Name of Contact					
Company Name					
Street Address					
Town, State, Zip					
Tel.		Fax		email	

## To Be Completed By Previous Employer:

Date of Termination: \_\_\_\_\_ Last Day Actually Worked: \_\_\_\_\_

Total Gross Income paid to employee over the last calendar year employed: \_\_\_\_\_

Reason for Termination: ☐ Employee Quit ☐ Other \_\_\_\_\_

Do you anticipate rehiring this employee? ☐ Yes ☐ No If yes, when: \_\_\_\_\_

Will the employee receive additional paychecks for Workman's Compensation? ☐ Yes ☐ No

If yes, provide the name and address of the company through which this can be verified:

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

Total severance pay anticipated for the next 12 months: \_\_\_\_\_

Is employee entitled to receive unemployment compensation? ☐ Yes ☐ No

### AUTHORIZED SIGNATURE

Print Name: \_\_\_\_\_ Title: \_\_\_\_\_

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

Telephone: \_\_\_\_\_

Please Fax form to SEB at (617) 782-4500 or mail to: SEB

Re: 37 Washington  
165 Chestnut Hill Ave #2  
Brighton, MA 02135

--OFFICE USE ONLY--

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

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

Comments: \_\_\_\_\_