



APPLICATION FOR HOUSING

LOW-INCOME HOUSING TAX CREDIT PROPERTY

PRELIMINARY APPLICATION FOR RESIDENCY

Please print. Fill in all information. Applications with missing information will not be considered. Please tell management agent if you need assistance.

Date _____

I. How did you learn about us?

II. General information concerning prospective resident(s):

Applicant's Name _____

Age _____ Date of Birth _____ Gender _____ Social Security No. _____

Home Address _____ Telephone Number _____

Own Home _____ Rent _____ Occupation _____

Marital Status _____ Spouse's Name _____

Age _____ Date of Birth _____ Social Security No. _____

Are you or your spouse (living or deceased) a Veteran who was on active duty during a time of war? Yes _____ No _____

Is applicant responsible for managing own finances? Yes _____ No _____

If no, please list name of responsible party:

Name of Responsible Party _____

Address _____

Telephone Number: Business _____ Home _____

E-mail Address : _____ Cell _____





A New Place to Call Home
in a Community that Cares 

Does applicant have a Power of Attorney (POA)? Yes _____ No _____

Name _____

Address _____

Telephone Number: Business _____ Home _____

E-mail Address : _____ Cell _____

Does applicant have guardian/conservator? Yes _____ No _____

Name _____

Address _____

Telephone Number: Business _____ Home _____

In case of emergency, whom should we notify?

Name _____ Relationship _____

Address _____

Telephone Number: Business _____ Home _____

E-mail Address: _____ Cell _____

III. Medical information concerning prospective resident:

Primary Physician:

Name _____ Telephone Number _____

Fax Number _____ Address _____

Current medical condition(s) _____



Past medical condition(s) _____

Applicant's physical mobility:

Walks unassisted _____ Uses a cane _____ Uses a walker _____

Uses a wheelchair _____ Uses an electric scooter _____

Applicant's assistance with daily living requirements:

Grooming Yes _____ No _____

Dressing Yes _____ No _____

Bathing Yes _____ No _____

Mouth/Skin Care Yes _____ No _____

Special Diet Yes _____ No _____

Medication Management Yes _____ No _____

Ambulation Yes _____ No _____

Other special needs _____

Does applicant have good eyesight? Yes _____ No _____

Does applicant require oxygen? Yes _____ No _____

Does applicant have colostomy/ileostomy? _____ Prosthesis? _____

Applicant's mental status:

Is applicant alert? Yes _____ No _____ Oriented to time/place? Yes _____ No _____

Is applicant forgetful? _____ Anxious _____ Confused _____

Has applicant been diagnosed with: Dementia _____ Alzheimer's Disease _____



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Has applicant been diagnosed as mentally ill or intellectually disabled? Yes ____ No ____

Please describe temperament of applicant. _____

Does applicant have need for a handicapped accessible apartment? Yes ____ No ____

Health Insurance: Medicare Number _____ Medicaid Number _____

HMO _____ **OR** BCBS Medex Number _____

Vehicle and Pet Information (if applicable):

Parking will be provided for one (1) vehicle.

Type of Vehicle: _____ License Plate # _____

Year/Make: _____ Color: _____

Do you own any pets? Yes ___ No ___ If so, will they come with you? Yes ___ No ___

If yes, describe: _____

IV. Financial Information

Cash Assets (Please use a separate paper for additional banks if necessary)

Bank _____

Address _____

Checking Account No. _____ Balance _____

Savings Account No. _____ Balance _____

Savings Account No. _____ Balance _____

Certificate of Deposit No. _____ Balance _____

Certificate of Deposit No. _____ Balance _____

Annuity: Yes ___ No ___ Amount \$ _____ With Whom _____

Does applicant have stocks and bonds? Yes _____ No _____

Does applicant have Series E/Savings Bonds? Yes ___ No ___ Trusts? Yes ___ No ___

Approximate value of securities _____

Other _____

Does applicant have life insurance? Yes _____ No _____ Company _____

If Yes: Type _____ Value _____

Does applicant own a home? Yes ___ No ___ Approximate Value _____

Is property jointly owned? Yes ___ No ___ With whom? _____

Amount of annual insurance premium: _____ Amount of recent tax bill: _____

Does applicant have a mortgage or any outstanding liens on property? Yes ___ No ___ Amount
_____ With whom _____

Does applicant own additional property? Yes ___ No ___

Approximate value \$ _____

Income(Please list **gross** amounts – prior to any deductions)

Social Security \$ _____/month Pension \$ _____/month

Veterans \$ _____/month

Disability \$ _____/month Interest & Dividend Income _____/month

Annuity Income \$ _____/month Life Insurance Income \$ _____/month

Rental Income \$ _____/month Other _____

Total Monthly Income \$ _____ Alimony \$ _____/month



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Do you anticipate any change in income in the next 12 months? Yes _____ No _____

Do you have Long Term Care Insurance? Yes _____ No _____

Heywood Wakefield Commons will, in compliance with applicable federal and state disability fair housing laws, make reasonable accommodations in policies or reasonable modification of common or unit premises for applicants with disabilities who require such changes to have equal access to any aspect of the application process or to the development and its programs and services. For example, Heywood Wakefield Commons will provide help in completing this application, provide this application in large print or other format, and arrange for sign language interpreters or other communication aids for interviews during the application process.

Heywood Wakefield Commons does not discriminate on the basis of race, color, religion, sex, national origin, sexual orientation, age, familial status or physical or mental disability, in the access or admission to its programs or employment, or in its programs, activities, functions or services.

Race (optional)

Information will be used for fair housing programs only, as required by state and federal laws.

American Indian/Alaskan Native Asian or Pacific Islander

Black (not of Hispanic origin) Hispanic White (not of Hispanic origin)

Size of Apartment needed:

Studio Two Bedroom

Unit Type requested (check as many as apply):

Wheelchair Adapted Unit

Hearing or Visually Adapted Unit

Does any member of the household have any accessibility or reasonable accommodation requests or changes in a unit or development or alternate ways we need to communicate with you? If yes, please explain.

Date Apartment Needed: _____

Family Composition – Including yourself, list all those who will occupy the apartment:

Full Name of Each Person Household	Relation to Head of Household	Date of Birth	Gender	Social Security No.
1. _____	_____	_____	_____	_____
2. _____	_____	_____	_____	_____
3. _____	_____	_____	_____	_____

V. Verifications

The agent may require applicants to sign releases to verify the information below:

- All income, asset, housing history, reference and need for requested accessibility changes;
- A credit check;
- Sufficient medical information to determine whether applicant needs and desires assistance with at least one activity of daily living or instrumental activity of daily living, but does not need assistance that exceeds the limits in 651 CMR 12.04;
- Information to establish GAFC eligibility status, if applicable.

All information will be treated confidentially and will be used only for the purpose described, in accordance with state and federal privacy laws and state and federal laws regarding credit and criminal information.

Once program and tenancy eligibility have been established, Heywood Wakefield Commons, or service coordinator, will ask applicant to sign releases to obtain medical information necessary to form a service plan.

CERTIFICATION

I/We hereby certify that I/We Do/Will Not maintain a separate subsidized rental unit in another location. I/We further certify that this will be my/our permanent residence. I/We understand I/We must pay first and last month's rent for this apartment prior to occupancy. I/We understand that my 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. I/We understand and agree that this application is neither a contract nor a reservation for residency. Nothing contained in this document is legally binding on either myself or Heywood Wakefield Commons, until a Residency Agreement has been signed and approved by all parties. In addition, acceptance for admission does not constitute acceptance into any third party payment program, which may have a separate criteria for admission. I/We authorize Heywood Wakefield Commons to conduct a review of my financial status and obtain any information necessary to verify my ability to pay for my residency. I/We further agree to give any written comments required to confirm such information and to cooperate with Heywood Wakefield Commons in providing information. I/We understand it will be necessary to update this information on an annual basis.

Head of Household/Applicant	Date
Co-Applicant	Date

(If this form is being completed by someone other than the applicant for residency, please print the name of the person completing the information, their relationship to the applicant, and sign on the line below. Please attach a copy of the Power of Attorney or other documentation authorizing a person to act on the applicant's behalf.)

Name _____ Relationship _____
Signature _____ Date _____

**Heywood Wakefield Commons Assisted Living Facility
Gardner, MA**

RELEASE OF INFORMATION

AUTHORIZATION FORM

I, _____ hereby authorize the owner and management agent of the above named housing community, and each of their staff, to contact any agencies, offices, groups or organizations to obtain any information or materials which are deemed necessary to complete my application or annual re-certification for participation in their housing program. I also permit this form to be duplicated.

Signed under the pains and penalties of perjury.

Signature

Date

**THIS INFORMATION IS VALID FOR A PERIOD OF
ONE YEAR FROM THE DATE NOTED ABOVE.**

All adult household members (18 years of age and older) in addition to signing the application must also sign the following: (If applicable to the program for which you are applying)

- All release forms required for third party verification
- Any other documents required as a condition of program participation