

WESTON COMMUNITY HOUSING, INC.
23 Village Road
Weston, MA 02493
781-891-7010

APPLICATION FOR RESIDENCE IN MERRIAM VILLAGE

Persons may apply who

- (1) are 60 years of age or older and
- (2) have an annual income* not exceeding \$54,900 for a single applicant and \$62,775 for a couple.

In the case of a couple, each person shall sign this application. If the couple's application is accepted, each person shall also sign the lease. However, for a married couple, only one spouse need be 60 years of age.

Preference will be given to persons sixty-five (65) and over who have the greatest financial and housing need, Weston residents, parents of Weston residents, and others who have a past or present relationship to Weston.

Weston Community Housing does not discriminate on the basis of race, creed, religion, gender or country of origin.

Weston Community Housing does not allow pets to be maintained in the buildings. Smoking is not permitted in any indoor space of Merriam Village, including an individual's apartment.

Merriam Village residents must be able to live independently.

- * In determining annual income, interest on the value of an applicant's home and other non-income producing property will be imputed at a rate to be determined from time to time. The current rate is 3.0%.

TO WESTON COMMUNITY HOUSING, INC.:

I, _____, hereby apply for occupancy in one of the apartments at Merriam Village, Weston Massachusetts, and represent that: **(a)** I am 60 years of age or older and that my annual income does not exceed the applicable amount set forth above and **(b)** I am physically and mentally fit to live independently (without any assistance). (Note: In the case of a couple, "I" shall be understood to mean "we".)

At the time I am notified of the availability of an apartment I will submit a letter based upon a medical examination from my physician, which will state that in the professional opinion of the physician I am mentally and physically able to live independent of any assistance. I will submit the letter within 14 days of such notification. I understand that Merriam Village may request me to undergo, at Merriam Village's expense, a further physical examination by a physician designated by Merriam Village.

If I accept an offered apartment, I will promptly deposit first month's rent and will enter into your standard lease agreement.

In recognition of the non-profit, tax-free status of Weston Community Housing, Inc. and the adjustment of rent from year to year to cover costs, I understand that each resident must cooperate within his/her/their ability to conserve heat and other utilities and to assist in the care of the building and grounds adjacent to his/her/their apartment.

I also understand that I may terminate the Lease Agreement at any time for any reason by giving 120 days prior notice in writing. Weston Community Housing, Inc. may terminate my tenancy as described in the lease.

I enclose herewith a statement relating to my residence, my age and health, and my financial resources.

Weston Community Housing (Merriam Village) reserves the right to require updated financial information at any time after residency.

I acknowledge receipt of a copy of the current lease used by Merriam Village, and understand that the form may change prior to signing.

Date

Signature of Applicant

Date

Signature of Applicant

PLEASE NOTE: Separate wait lists will be kept for each type of apartment. Indicate the lists you would like to be on. You will not be considered for those apartments in which you have not expressed an interest.

- _____ One bedroom, first floor
- _____ Two bedroom, first floor
- _____ Two bedroom, second floor, walk-up
- _____ One bedroom with den, first floor or elevator access
- _____ One bedroom handicap-equipped

**CONFIDENTIAL SUPPLEMENT TO APPLICATION
FOR RESIDENCE IN MERRIAM VILLAGE**

1. Name _____ Name _____
 SS# _____ SS# _____
 Date of Birth _____ Date of Birth _____
 Address _____

 Phone Number _____

2. Check one: Married (spouse living) _____; Widowed _____; Single _____

3. List all gross income of yourself and spouse for the most recent calendar year:

<i>Type of Income</i>	<i>Source</i>	<i>Amount of Income (annual basis)</i>
Earned Income	_____	_____
Social Security (Gross Amount)	_____	_____
Pension	_____	_____
IRA Account	_____	_____
Other Deferred Benefit Plans	_____	_____
Defined Contribution Plans (401k, 401b, etc.)	_____	_____
Annuity	_____	_____
Dividends	_____	_____
Interest	_____	_____
Certificates of Deposit	_____	_____
Other	_____	_____
Total Annual Income		

** You must attach a copy of the two most recent tax returns.*

4. I and/or my spouse own a home _____ (yes/no) * *You must attach a copy of the most recent property tax bill from your town.*

Its fair market value is approximately _____
 Less mortgage or liens _____
 Less deferred property taxes _____
 Balance _____

Name and address of Bank holding your mortgage:

5. List by address and state the current market value of other real estate. * *You must attach a copy of the most recent property tax bill from your town.*

6. I/We have investments (list all financial assets below) including stocks, bonds, IRA's, Deferred Benefit (Retirement) Fund, Defined Contribution/401k Plan, Defined Benefit Plan (Pension), CD's and cash (savings accounts) in the total amount of \$ _____, the *income* from which is listed above in question #3.

List here the name of each company and number of shares, amount and type of bonds, (e.g., Savings, Zero Coupon, etc.), as well as each bank and amount on deposit of invested CD's and cash, and retirement plans from which you derived your total amount given above.

<u>Name/Type of Investment or Holding</u>	<u>#Shares</u>	<u>Valued as of (date)</u>	<u>Total Value</u>
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7. I/We have outstanding debts, not counting current bills or home mortgage, in the total amount of \$ _____. *List here a description of these debts.

8. Indicate if you are the Grantor, Beneficiary, or Trustee of a Trust _____ (yes/no).
If the answer is "yes", further details may be requested.

9. List (by date, name of Donee and amount), including any trust, all gifts made by you and/or your spouse within the last 3 calendar years exceeding \$1,000. * *You must attach a copy of the U.S. Gift Tax Return Filing*

10. My/Our estimated income for the current year ending _____ is \$ _____. Describe any anticipated changes in your income in the near future.

11. My/our total net worth is: \$ _____

12. Please give the names and addresses of two people, preferably professional people, as reference:

13. If you currently rent an apartment, what monthly rent do you pay? \$ _____

14. Describe your present or past relationship with Weston, if any.

15. Why do you need an apartment at this time?

1. At this time, are you able to live independently in the type of apartment you have requested in the **Application for Residence in Merriam Village**? _____ (yes/no)

2. Do you have family members living in the area who could assist you in the event of an emergency? Please list their name, address and telephone number below.

Attachments:

1. Attach a copy of the last two years' U.S. Individual Income Tax Return (Form 1040.) If you have capital gains or ordinary losses of an unusual nature which are reflected in your last year's tax return, please describe here.

2. If you own a house or other property attach a copy of a real estate tax bill for each property showing the assessed value.

3. If you have given gifts described in question #9, attach a copy of the most recent U.S. gift tax return.

I/We attest that the above statements and any supplemental information and documents provided to Merriam Village are true, accurate, and complete and authorize inquiries for the purpose of verifying all answers.

Date

Signature of Applicant

Date

Signature of Applicant