



your resource for Affordable Housing



## The Vault at 88 Project Information and Lottery Application Weymouth, MA

Reasonable Accommodations are available.

Attached is the information regarding the affordable rental units at The Vault at 88 in Weymouth, 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 at 88 Pleasant Street, The Vault at 88 is a new 30-unit multifamily rental development offering 3 affordable studio and one-bedroom apartments for eligible tenants, by lottery. At least one surface parking spot is available for each unit at no charge. Garage parking is available, based on availability, at \$100/mo. Each unit includes one bathroom, all kitchen appliances and washer/dryer hook-ups. This is a smoke free development. A maximum of two pets, dogs and cats, are allowed. Dogs are allowed that weigh under 70 lbs. Breed restrictions apply. The monthly pet rent is \$50/mo. per cat and \$75/mo. per dog.

The rents are not based on your household income or subsidized; you are responsible for the full monthly rent as stated below. Section 8 or other housing vouchers are accepted but you should contact your Section 8 provider to determine if they will accept the project.

The monthly rents are:

Studio :	\$1,440
One Bedroom:	\$1,845

Tenants are responsible for all utilities except sewer. Utilities are electric. A utility allowance has been deducted from the stated rent. The minimum income to lease an affordable apartment, without a Section 8 or other housing voucher, are: Studio - \$43,200 and One Bedroom - \$55,350. A combination of income and assets may be taken into consideration in determining minimum income requirements.

***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 documentation and additional forms, if applicable, 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.***

### Key Meeting Dates

#### **Public Information Meeting via Zoom**

6:30 p.m., Monday September 11, 2023

Go to Zoom.com and enter the following, when prompted:

Meeting ID: 867 2870 8639

Passcode: 774944



**Application Deadline**

October 2, 2023

**Lottery via Zoom**

3:00 p.m., Friday, October 27, 2023

Go to Zoom.com and enter the following, when prompted:

Meeting ID: 856 9057 1587

Passcode: 846096

Thank you for your interest in affordable housing at ***The Vault at 88***. We wish you the best of luck. Please contact MCO Housing Services at 978-456-8388 or email us at [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com) if you have any questions. We encourage you to advise other people or organizations that may be interested in this program and make copies of the relevant information as needed.



This is an important document. Please contact [AGENCY NAME] at [PHONE #] for free language assistance.

Este documento es muy importante. Favor de comunicarse con el MCO Housing en 978-456-8388 para ayuda gratis con el idioma. (Spanish)

Este é um documento importante. Entre em contato com o MCO Housing Serv no número 978-456-8388 para obter assistência gratuita com o idioma. (Portuguese)

Dokiman sila a enpòtan. Tanpri kontakte MCO Housing la nan 978-456-8388 pou asistans gratis nan lang. (Haitian Creole)

此文件為重要文件。如果您需要免費的語言翻譯幫助，請聯絡 MCO Housing 聯絡方式：978-456-8388。(Chinese, Traditional)

此文件為重要文件。如果您需要免費的語言翻譯幫助，請聯絡 MCO Housing 聯絡方式：978-456-8388。(Chinese, Simplified)

Это весьма важный документ. Свяжитесь с сотрудником MCO Housing на предмет оказания бесплатной помощи по переводу на иностранный язык (978-456-8388). (Russian)  
(Phone #)

នេះគឺជាឯកសារសំខាន់។ សូមទំនាក់ទំនង MCO Housing តាមរយៈ 978-456-8388 ដើម្បីទទួលបានជំនួយផ្នែកភាសាដោយឥតគិតថ្លៃ។ [Mon-Khmer, Cambodian]

Đây là một tài liệu quan trọng. Vui lòng liên hệ MCO Housing tại 978-456-8388 để được hỗ trợ ngôn ngữ miễn phí. (Vietnamese)

Kani waa dukumentiyu muhiim ah. Fadlan MCO Housing kala soo xiriir 978-456-8388 si aad u hesho gargaar xagga luqadda oo bilaash ah. (Somali)

هذه وثيقة مهمة. يرجى الاتصال بـ MCO Housing بـ 978-456-8388 للمساعدة اللغوية المجانية.  
[Phone #] [Agency Name] (Arabic)

Ce document est très important. Veuillez contacter le MCO Housing au 978-456-8388 afin d'obtenir une assistance linguistique gratuite. (French)

Il presente è un documento importante. Si prega di contattare il MCO Housing al 978-456-8388 per avere assistenza gratuita per la traduzione. (Italian)



**The Vault at 88**  
Question & Answer

The units will be leased in accordance with policies and guidelines established by the Commonwealth of Massachusetts Executive Office of Housing and Livable Communities (EOHLC).

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

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

Household Size	1	2
Max Allowable Income	\$82,950	\$94,800

**(income limits are subject to change when HUD releases the 2024 income limits)**

**LOTTERY APPLICANT QUALIFICATIONS:**

1. Household income cannot exceed the above maximum gross allowable income limits. Income from household members 18 or older are required.
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 leasing agent and your eligibility will be determined based on the Leasing Office Screening. If a criminal background screening is part of the Leasing Office screening it will be conducted in accordance with DHCD’s MODEL POLICY REGARDING APPLICANT SCREENING ON THE BASIS OF CRIMINAL RECORDS.
4. The units can be adapted to satisfy reasonable accommodation requests. Persons with disabilities will be given first preference for such units regardless of what pool they are in based on the requested bedroom size. Where a person with a disability is awaiting an accessible unit and a unit with adaptive features becomes available, the owner/management agent must offer to adapt the unit.
5. You cannot own a home and lease an affordable apartment. The home must be sold prior to lease execution.

**Are there units available for Local Preferences?**

Yes, 2 of the 3 units are available for applicants meeting at least one of the Local Preference Criteria as listed on page

**Are there adaptable?**

All of the units are adaptable. The units can be adapted to satisfy a reasonable accommodation request. There is an elevator in the building. 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. The request for reasonable accommodation must be made at time of initial lottery application with the required documentation, i.e. letter from doctor.

**Are there considerations for minorities?**

If the percentage of minority applicants in the Local Preference Pool is less than the percentage of minorities in the Surrounding HUD-defined area, currently 33.4%, a preliminary lottery will be held comprised of all the minority applicants who do not qualify for the Local Preference Pool. Minority applicants not otherwise qualifying for the Local Preference Pool would be drawn at random from the Open Pool until the percentage of minorities in the Local Pool is no longer below the percentage of minorities in the surrounding HUD-defined area. Applicants not selected for the Local Preference Pool would be in the Open Pool only.

**Are there preferences for Household Size?**

In all cases, preference for the studio and one-bedroom units will be for households that require one-bedroom.

Unit size preferences are based on the following:



1. There is at least one occupant per bedroom.
2. 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.
3. A person described in the first sentence of (2) 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.
4. A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
5. If the applicant is in the process of a divorce or separation, the applicant must provide proof that the divorce or separation has begun or has been finalized, as set forth in the application.

Applicants will not be offered a unit larger than their household is eligible for based on the above unit size preferences. Make sure you check the appropriate bedroom size on the application, otherwise you may lose the opportunity to lease.

**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 allowable income adjusted for household size, 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.

Three (3) affordable units are available by lottery at The Vault at 88. All units will be distributed through the Local Preference and Open Pool. The unit breakdown is as follows:

Unit Size	# of Units	Local Pool	Open Pool
Studio	2	1	1
One Bedroom	1	1	0

All eligible applicants will receive a lottery code which will be pulled at the time of the lottery. Local Preference Pool applicants will have two opportunities for a unit by being included in both the Local Preference Pool and the Open Pool. Open Pool applicants will have one opportunity for a unit.

The lottery will establish the rankings for the distribution of units. This means the highest ranked applicants meeting the household size preference for a studio and one-bedroom unit will have the initial opportunity to lease. The highest ranked applicants in the Open Pool will have the initial opportunity to lease a studio apartment based on household size preference. Applicants from the Local Pool will select units first.

**Please note:** Applicants will not be offered a unit larger than their household is eligible for based on the above unit size preferences. (See page 3) Make sure you check the appropriate bedroom size on the application, otherwise you may lose the opportunity to lease. Household size shall not exceed, nor may the maximum allowable household size be more restrictive than, State Sanitary Code requirements for occupancy of a unit (See 105 CMR 400). Applicants will not be approved for units larger than their household size allows.

Once the lottery rankings have been determined your information will be forwarded to the Leasing Office for credit and background checks. Any additional screening by the property shall meet DHCD’s Model Policy Regarding Applicant Screening on the Basis of Criminal Records. Furthermore, mitigating circumstances shall be considered in assessing eligibility for tenancy.



If the Leasing Office determines you are eligible, only then will you be offered a lease. A security deposit equal to one months rent will be required prior to move-in.

You need to be determined eligible by MCO Housing Services, the Leasing Office and your Public Housing Authority (PHA), if you have a Section 8 or other housing voucher. If the PHA determines you or the project do not meet the eligibility criteria, then you will not be able to lease a unit.

If there are lottery applicants remaining once the affordable units are leased then they will be the beginning of the waiting list for future vacancies.

### ***Time Frames***

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. You also need to pass the Leasing Office screening before you will be offered a unit. The screening can include credit, past landlord, employment verification, CORI etc. If you do not pass the Leasing Office Screening you will not be offered a unit. If you have a Section 8 voucher your Public Housing Authority (PHA) needs to accept the project and rents before a lease is offered.

### ***Acceptance of Units***

The initial lottery “winners” may have a choice of the appropriately sized available affordable units. Post lottery each applicant will need to meet with the Leasing Office and complete their screening by the deadline provided. If you miss the deadline, we will move to the next applicant waiting for a unit and you may lose the opportunity to lease.

### ***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.



## AFFORDABLE UNIT NUMBERS

Unit #	# of Bedrooms	Sq. Ft.	Pool
209	Studio	392	Open
302	One	684	Local
403	Studio	405	Local

### Project Amenities

Fitness Room

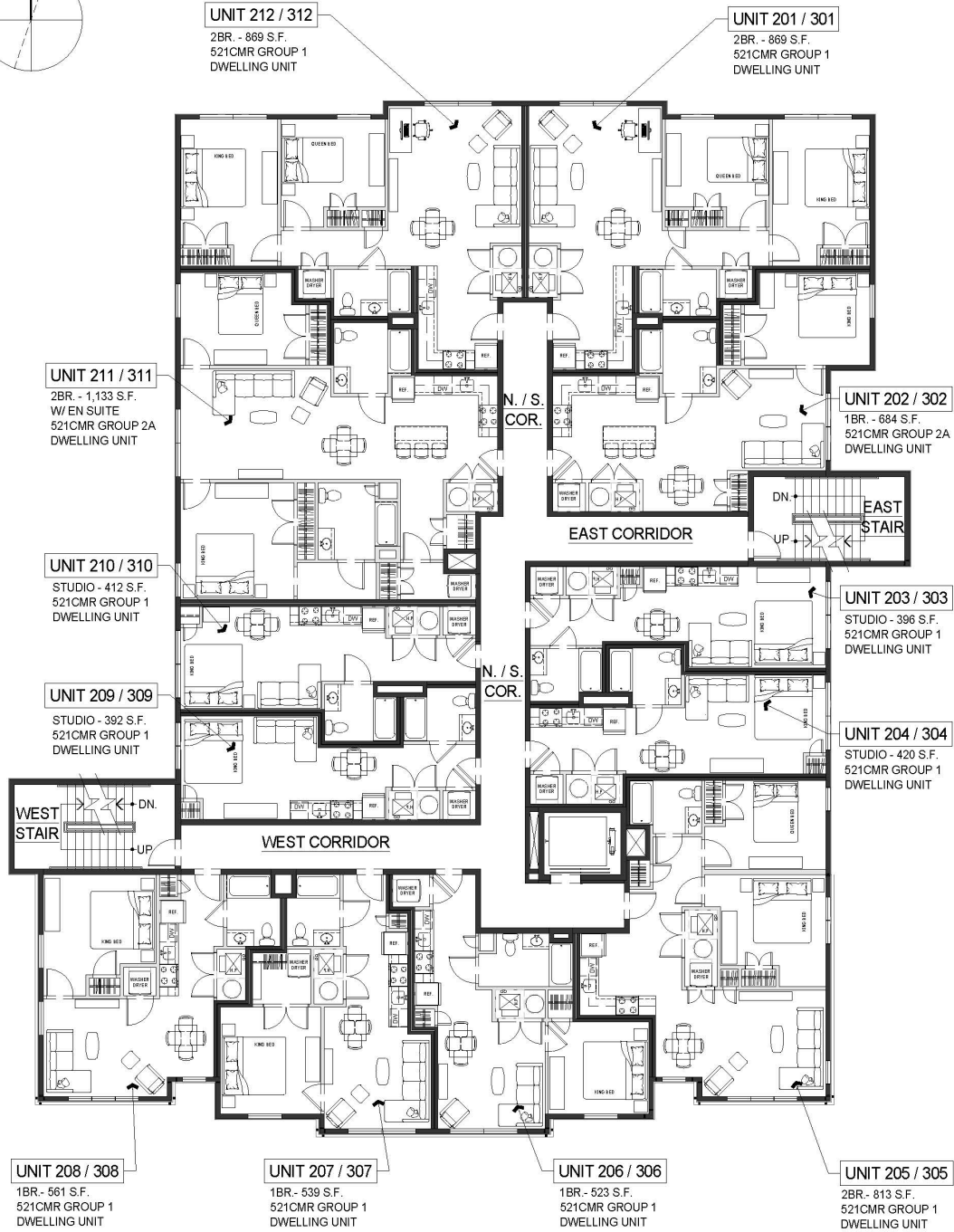
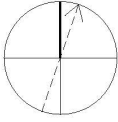
Garages for a monthly fee

Dog Wash Station

Common Area Lounge



PROJECT  
NORTH



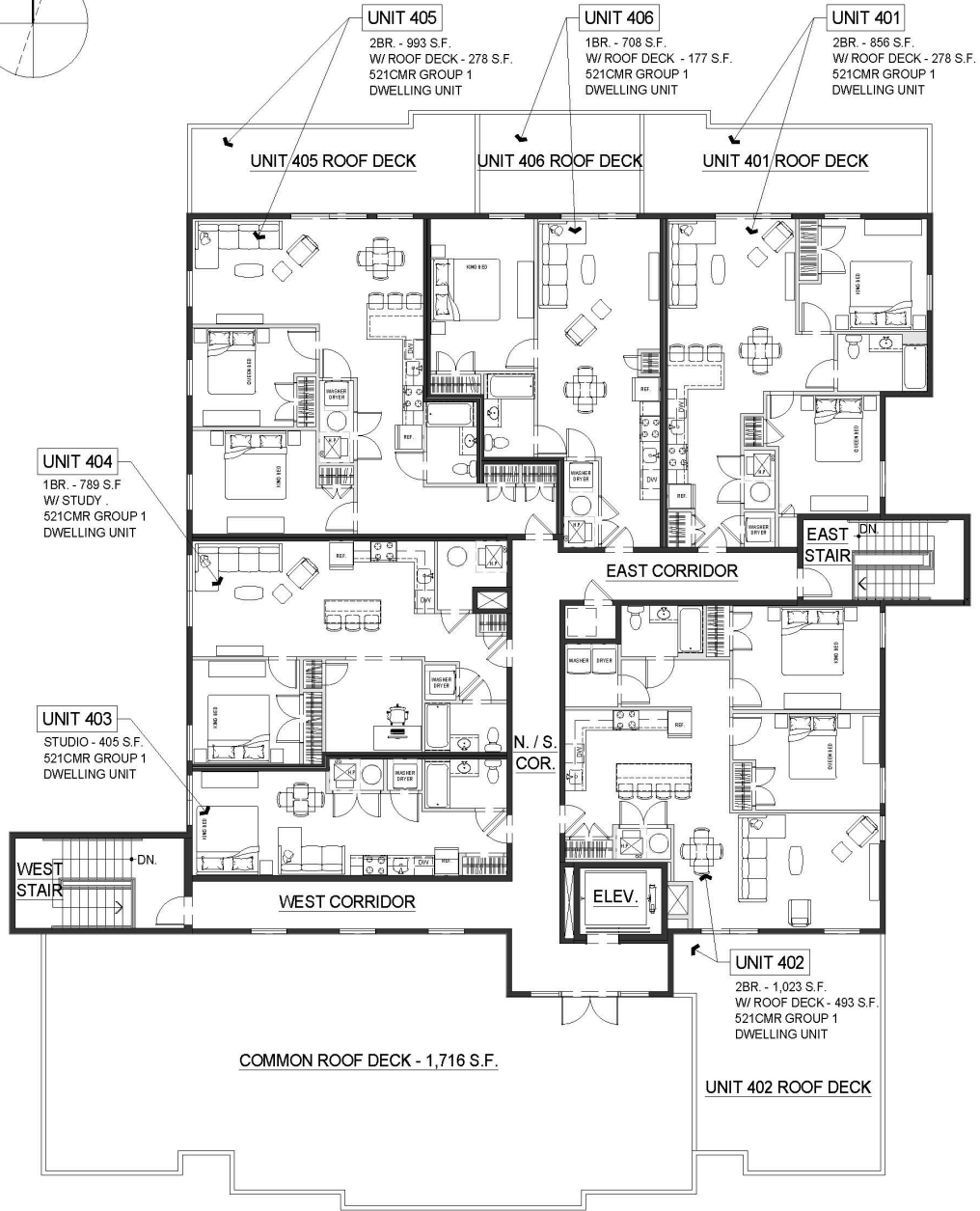
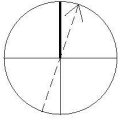
## SECOND AND THIRD FLOOR PLANS

3/32" = 1'-0"

The  
**VAULT**  
at 88



PROJECT  
NORTH



## FOURTH FLOOR PLAN

3/32" = 1'-0"

*The*  
**VAULT**  
*at 88*

## **PLEASE READ THE FOLLOWING CAREFULLY**

- 1. More than 60% of applications submitted to MCO Housing Services for lotteries are incomplete and not included in lotteries. Please take the time to read the application and submit all required documentation. It is your responsibility to provide the correct documentation. It does not matter if you were the first application or the last application received, we will NOT review applications until AFTER the posted deadline.**
- 2. Read the NOTES on the Required Personal Identification and Income Verification Documents. Failure to do so could mean the difference between a complete and incomplete application as well as eligibility for a unit.**
- 3. All financial documentation, income and assets, are required from all household adults aged 18 or older. No exceptions.**
- 4. DO NOT ASSUME you do not need to provide a certain document. When in question call or email BEFORE you submit your application.**
- 5. Do NOT forget to include statements from Robinhood or any other online investment accounts. They are considered part of your assets. If you have an open account, you must provide statement whether there are any funds in the account or not.**
- 6. If you are unable to provide specific information, then submit a note with your application explaining the circumstances. This will not guarantee your application will be included in the lottery, but depending on the circumstances, we may be able to work with you.**
- 7. Do not take photos with your cellphone of any documentation and email it to us. The photos are not legible, and we will not accept them.**
- 8. You can fax your information, but it is not recommended. If all pages are not received your application would be considered incomplete.**

**COMPLETE, SIGN, DATE AND RETURN**

**ALL APPLICABLE DOCUMENTS**

**FROM THIS POINT FORWARD**



# The Vault at 88

## LOTTERY APPLICATION

**Application Deadline: October 2, 2023**

**For Office Use Only:**

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

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

Local: Y / N

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

**PERSONAL INFORMATION: PLEASE PRINT LEGIBLY**

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

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

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

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

Email: \_\_\_\_\_ Do you own a home? \_\_\_ Yes \_\_\_ No

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

- Current Weymouth Resident
- Currently employed by the Town of Weymouth
- Employees of local Weymouth businesses or with an offer of bonafide employment from a company located in the Town of Weymouth
- Families with children attending the Weymouth School System, such as METCO students

Do you have a Section 8 or other housing voucher: \_\_\_ Yes \_\_\_ No

Bedroom Size: \_\_\_ Studio; \_\_\_ One Bedroom

Do you need special accommodation? \_\_\_ Yes \_\_\_ No

If yes: please describe: \_\_\_\_\_

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

Household Composition - include all who will be living in the unit.

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_

**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's Monthly Base Income (Gross) \_\_\_\_\_

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

Co-Applicant's 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 3 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 \_\_\_\_\_  
 Monthly Gift Amount \_\_\_\_\_

**TOTAL ASSETS** \_\_\_\_\_

**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	_____	_____	_____

**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 The Vault at 88. I (we) understand if selected all information provided shall be verified for accuracy at the time of lease. I/we understand if I/we provided an incomplete application it will not be included in the lottery.

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

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

See page 19 for Submission information



# The Vault at 88

## Affidavit & Disclosure Form

I/We understand and agree to the following conditions and guidelines regarding the distribution of the affordable units at The Vault at 88 through EOHLC in Weymouth, MA:

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

Household Size	1	2
Max Allowable Income	\$82,950	\$94,800

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. If assets \$5000 or less the actual interest/dividends earned will be added to income in determining eligibility.
3. The household size listed on the application form includes 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 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 your eligibility to lease.
6. I/We understand that if selected I/we may be able to select a unit. If I/we reject a unit I/we will move to the bottom of the lottery list and may not have another opportunity to lease an affordable unit at The Vault at 88.
7. Program requirements are established by DHCD. 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 DHCD is final.
8. I/We certify that no member of our family has a financial interest in The Vault at 88.
9. I/We understand there may be differences between the market and affordable units and accept those differences.
10. I/We understand we need to be recertified annually to determine continued eligibility. I/We understand that if my/our total income exceeds 140% of the maximum allowable income at the time of annual recertification, after the end of my then current lease term I will no longer be eligible for the affordable rent. I/We also understand if we fail to provide the required recertification information, we have the option of paying market rent or moving out.
11. I/We understand that if my/our lottery application is incomplete it will not be included in the lottery, and we will lose our opportunity to lease an affordable unit.

I/We have completed an application and have reviewed and understand the process that will be utilized to distribute the available units at The Vault at 88. I/We am qualified based upon the program guidelines and agree to comply with applicable regulations.

\_\_\_\_\_  
Applicant

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

\_\_\_\_\_  
Date



**The Vault at 88**  
**Weymouth, MA**

***Release of Information Authorization Form***

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

I/We hereby authorize MCO Housing Services, The Vault at 88 Leasing Office, 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, The Vault at 88 Leasing Office, or any of its assignees and consequently the Projects Administrator, for the purpose of determining income eligibility for The Vault at 88.

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. Complete financial documentation is required and must be sent with your application to be reviewed. Incomplete applications will NOT be included in the lottery. If you have questions, it is your responsibility to contact MCO Housing Services prior to submitting your application at 978-456-8388.

**Initial each that are applicable, and provide the documents, or write N/A if not applicable and return with your application.**

1. \_\_\_\_\_ Identification for each household member, i.e. Social Security Card, Birth Certificate etc.
2. \_\_\_\_\_ If you have a Section 8 Voucher or other Housing Voucher, you MUST provide a valid copy with your application.
3. \_\_\_\_\_ If you require a Reasonable Accommodation you must request the reasonable accommodation as part of your application and if documentation is required, i.e. doctors letter, it MUST be included with the application.
4. \_\_\_\_\_ The last five (5) **consecutive** pay stubs for all jobs (check/direct deposit stubs). For unemployment or DOR verification stating benefits received and when they will end. Same for disability compensation, worker's compensation and/or severance pay.
  - **NOTE:** If you have obtained a new job within the last 12 months you must provide a copy of the Employment Offer Letter.
  - **NOTE:** If you are no longer working for an employer you worked for in the last 12 months, you must provide a letter from the employer with your separation date.
  - **NOTE:** You need to provide 5 pay stubs whether you are paid weekly, bi-weekly or monthly.
5. \_\_\_\_\_ Current year Benefit letter providing full amount of gross 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/or alimony: divorce papers or court document indicating the payment amount and/or DOR statement. If you do not receive child support provide a letter stating that you are not receiving child support or complete the form at the end of this information for each child.
7. \_\_\_\_\_ If you are self-employed you MUST provide a detailed expense and income spreadsheet for the last 12 months and three months of business checking and savings accounts.
8. \_\_\_\_\_ Federal Tax Returns –2022. (NO STATE TAX RETURNS)
  - **NOTE:** Provide all pages that are submitted to the IRS. For example, if a Schedule 1 is submitted to the IRS and not part of your application, your application will be considered incomplete.
  - **NOTE:** If you have not filed tax return, in the required year, you must submit a letter from the IRS verifying you have not filed. To obtain the letter submit form 4506-T, located at irs.gov, to the IRS



and they will mail you the letter or you can create an account at irs.gov and print out the letter for each tax year, if needed.

- **NOTE:** If you are unable to locate your tax return you can submit a Transcript of your tax return. To obtain a Transcript complete Form 4506-T, located at irs.gov and submit to the IRS or you can create an account at irs.gov and print out a copy for each tax year, if needed.

9. \_\_\_\_\_ W2 and/or 1099-R Forms: 2022

- **NOTE:** If you are unable to locate your W2/1099's you can submit a Wage Transcript of your W2/1099's. To obtain a Transcript complete Form 4506-T, located at irs.gov, and submit to the IRS or you can create an account at irs.gov and print out the transcript for each tax year, if needed.

10. \_\_\_\_\_ Interest, dividends and other net income of any kind from real or personal property.

11. Asset Statement(s): provide **current** statements of all that apply, unless otherwise noted:

i. \_\_\_\_\_ Checking accounts – Last **three (3)** months of statements – EVERY PAGE – FRONT AND BACK.

**NOTE:** If you have cash deposits, non-payroll or income deposits you MUST identify where the funds have come from. If you fail to explain they will be counted as income, which may put you over the income limit. This includes VENMO, PayPal, Cash apps etc.

**NOTE:** Do NOT provide a running transaction list of activity. You must provide individual monthly bank statements.

ii. \_\_\_\_\_ Pre-paid debit card statements – current month.

**NOTE:** This is NOT your ATM/Debit card. This is usually a separate debit card statement showing income deposited directly onto the debit card, i.e. Social Security or other regular income.

**NOTE:** If Social Security payments are deposited on a Direct Express card it is your responsibility to provide proof. You can print a statement from the Direct Express website at

<https://www.usdirectexpress.com/>.

iii. \_\_\_\_\_ Saving accounts – last three months of full statements, every page/front and back.

**NOTE:** If you have cash deposits, non payroll or income deposits you MUST identify where the funds have come from. If you fail to explain they will be counted as income, which may put you over the income limit. This includes VENMO, PayPal, Cash apps etc.

**NOTE:** Do NOT provide a running transaction list of activity. You must provide individual monthly bank statements.

iv. \_\_\_\_\_ VENMO, PAYPAL, CashApps etc. last statements

v. \_\_\_\_\_ Revocable trusts

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

vii. \_\_\_\_\_ Investment accounts, including stocks, bonds, Treasury Bills, Certificates of Deposit, Mutual Funds, Money Market, Robinhood, Acorn and all online accounts etc.

viii. \_\_\_\_\_ Retirement including, i.e. IRA's, Roth IRA's, 401K, 403B, Keogh accounts, Pensions etc. from current and past employers.

ix. \_\_\_\_\_ Cash value of Whole Life or Universal Life Insurance Policy.

x. \_\_\_\_\_ Personal Property held as an investment





xi. \_\_\_\_\_ Lump-sum receipts or one-time receipts

12. \_\_\_\_\_ Proof of current student status for dependent household members over age of 18 and full-time students. Letter from High School or College providing student status, full time or part time for current **and** next semester.

11. \_\_\_\_\_ A household may count an unborn child as a household member. The household must submit proof of pregnancy, i.e. letter from doctor.

12. \_\_\_\_\_ If the applicant is in the process of a divorce or separation, the applicant must provide legal documentation that the divorce or separation has begun or has been finalized. Information must be provided regarding the distribution of family assets, child support and alimony, if applicable. If you are unable to provide, then both parties income/assets and homebuyer status will be used in determining eligibility.

If you are already divorced provide documentation.

We understand if we do not provide all applicable financial documentation, we will not move forward in the lottery approval process.

Print Applicants Name(s): \_\_\_\_\_

\_\_\_\_\_  
Applicants Signature

\_\_\_\_\_  
DATE

\_\_\_\_\_  
Co-Applicants Signature

\_\_\_\_\_  
DATE



## Return the following documents:

- Complete and signed Lottery Application
- Signed and dated Affidavit and Disclosure Form
- Signed and dated Authorization to Release Information Form
- Complete, signed and dated Required Personal Identification & Income Verification Document Form
- All required personal identification and financial documentation
- Special accommodation documentation, if needed
- Custody and Child Support Affidavit per child, if needed

**RETURN ALL, postmarked on or before the October 2, 2023 application deadline  
to:**

MCO Housing Services, LLC  
P.O. Box 372  
Harvard, MA 01451  
Overnight mailing address: 206 Ayer Road, Harvard, MA 01451  
Phone: 978-456-8388  
FAX: 978-456-8986  
Email: [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com)  
TTY: 711, when asked 978-456-8388

**NOTE:** If you are mailing your application close to the application deadline, make sure you go into the Post Office and have them date stamp and mail. Mail that is sent to the central sorting facility may use bar codes so we would have no idea when the application was mailed and it can take longer for MCO to receive. If we receive an application after the deadline that has a barcode it will be counted as a late application and will not be included in the lottery.



## Custody & Child Support Affidavit

**Applicant/Tenant:** \_\_\_\_\_ **Unit #:** \_\_\_\_\_

***Please complete a separate form for each minor in this unit not living with both biological or adoptive parents:***

Child Name/SSN(last four digits)/DOB : \_\_\_\_\_ / \_\_\_\_\_ / \_\_\_\_\_

Name of Absent Parent: \_\_\_\_\_

Will this child live with you in the tax credit apartment at least 50% of the time?

**YES**       **NO**

Was there a legal marriage to the other parent?  **YES**    **NO**    **STILL LEGALLY MARRIED**

- If **YES**, please submit a copy of the divorce decree, separation agreement, or other document outlining custody arrangements.
- If **NO**, please submit documents such as court order, tax return, school records, or DHS records showing placement of child

Who claimed the child as a dependant on their most recent tax return?

**I did**    **The absent parent**    **Other:** \_\_\_\_\_    **No one**

Do you receive support (monetary or not) for this child?  **YES**    **NO**

*(Note: "Support" may be legally ordered or an informal agreement)*

If **YES** list amount \$ \_\_\_\_\_ per \_\_\_\_\_

Have you ever been awarded an amount of child support for this child through the courts?

**YES**       **NO**

If awarded but not paid, have you taken legal action to collect child support?

**YES**       **NO**

If so, please describe efforts and proof: \_\_\_\_\_

Do you expect to receive child support for this child in the next 12 months?

**YES**       **NO**

Under penalty of perjury, I certify that the information presented in this certification is true and accurate to the best of my knowledge. The undersigned further understand that providing false representation herein constitutes an act of fraud. False, misleading or incomplete information may result in the termination of a lease agreement.

\_\_\_\_\_  
(Signature of Household Member)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Signature of Manager)

\_\_\_\_\_  
Date

**Custody & Child Support Affidavit**

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