



**EverGreen Real Estate
Development Corporation**

Specializing in Quality Housing at Affordable Rates for Income-Qualified Residents



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PRELIMINARY APPLICANT INFORMATION

PRELIMINARY APPLICANT INFORMATION AND INCOME AND ASSET DISCLOSURE FOR THE ROSE AFFORDABLE SENIOR ASSISTED LIVING COMMUNITIES

[Click here for a printed form.](#)

This Preliminary Applicant Information and Income and Asset Disclosure form will permit the property manager to screen your eligibility for residing at the property. More detailed information and verifications will be required prior to your actual approval for residency. This prescreening is intended to allow you and the property manager to recognize immediately any issues of income eligibility that exist. Your cooperation will facilitate the processing of your application and will avoid surprises later in the process. As you complete this form, please contact us with any questions.

Apply To:

Thank you for applying for residency in our affordable senior living community. Before you complete this form, please tell us how you learned about our property:

Comment:

Applicant Information

	Applicant(s) Name	Relation	Social Security No.	Date of Birth
1.				
2.				

0 yes 0 no Are you 55 or older?

How can we contact you for additional information if needed?

Contact Name: Home Phone:
 Work Phone: Cell Phone:
 Home Address:
 City: State: Zip Code:
 Email Address:

Gross Annual Income For Each Applicant

	Wages	Self Employment	Social Security SSI Pension Disability Workers Comp. Veterans Benefits	Public Assistance	Other; e.g. recurring financial contributions or gifts
1.					
2.					
Total					

Assets and Other Income

Assets	Cash Value*	Actual Income from Asset
Cash on Hand		

Checking Account		
Savings Account		
Safety Deposit Box		
Certificates of Deposit		
Money Market Funds		
Stocks		
Bonds		
IRA Accounts		
401 Accounts		
Keogh Accounts		
Trust Funds <ul style="list-style-type: none"> • Revocable • Irrevocable 		
Real Property, including home or rental property		
Land Contracts, Including Contracts for Deed or Mortgages		
Lump Sum Receipts in last 2 years, including inheritance or personal injury receipts		
Capital Investments		
Life Insurance Policies (excluding term policies)		
Other Retirement/Pension Funds not Included above		
Personal Property held as an investment; e.g. coin collections, art, antiques cars. Do not include necessary personal property		
Other		

*Cash value is defined as the market value minus the cost of converting the asset to cash. The cost of conversion includes such fees as broker's fees, settlement costs, early withdrawal penalties, etc.

Yes No Within the last two (2) years I/we have sold or given away assets (including cash, accounts, real estate, etc.) for less than the asset's fair market value. If yes, please list the assets below.

Asset	Cash Value	Value Received	Date Disposed

Yes No Are you on the Section 8 Housing Choice Voucher?

Yes No Are you on the Elderly Waiver?

If so, who is your case manager?

[Submit Preliminary Form]