

- | <u>YES</u> | <u>NO</u> | |
|------------|-----------|--|
| o | o | 1. Do you expect any additions to the household within the next twelve months?
Name & Relationship to Household: _____
Explanation: _____ |
| o | o | 2. Do you have full custody of your child(ren)?
Explanation of custody arrangements or indicate N/A: _____ |
| o | o | 3. Are any household members foster children or foster adults?
Name(s): _____ |
| o | o | 4. Are any household members temporarily absent?
Name and Relationship to Household: _____ For How Long? _____ |
| o | o | 5. Are any household members permanently absent?
Name and Relationship to Household: _____ |
| o | o | 6. Have you ever filed for bankruptcy? Is bankruptcy discharged?
Explanation: _____ |
| o | o | 7. Have you ever been convicted of a felony or a violent crime?
Explanation: _____ |
| o | o | 8. Have you ever been evicted from an apartment for any reason?
Explanation: _____ |
| o | o | 9. Do you wish to receive a written explanation of a denial of tenancy?
Explanation: _____ |

II. Housing References:

List the past *TWO YEARS* of housing references.

- 1. Present Address:** _____ **City:** _____ **State:** ____ **Zip:** _____

From: _____ **To:** _____ (Month/Year) **Rent or Mortgage Amount: \$** _____

Landlord: _____ **Landlord's Phone Number (____)** _____

Landlord's Address: _____ **Landlord's Email:** _____

Reason for Leaving: _____ **Did you rent or own at this address?** _____

- 2. Former Address:** _____ **City:** _____ **State:** ____ **Zip:** _____

From: _____ **To:** _____ (Month/Year) **Rent or Mortgage Amount: \$** _____

Landlord: _____ **Landlord's Phone Number (____)** _____

Landlord's Address: _____ **Landlord's Email:** _____

Reason for Leaving: _____ **Did you rent or own at this address?** _____

III. Employment / Income Sources (please list the last two years of employment/income sources)

1. **Current Employer or Income Source** _____ **Monthly Gross Income \$** _____
Start Date (Day/Month/Year) _____ **Contact Name** _____
Contact Email _____ **Contact Phone #** _____
2. **Current Employer or Income Source** _____ **Monthly Gross Income \$** _____
Start Date _____ **Contact Name** _____ **Contact Email** _____ **Contact Phone #** _____
3. **Previous Employer / Income Source** _____ **Monthly Gross Income \$** _____
Contact Name _____ **Employment Dates** _____
Contact Email _____ **Contact Phone #** _____
4. **Previous Employer / Income Source** _____ **Monthly Gross Income \$** _____
Contact Name _____ **Employment Dates** _____
Contact Email _____ **Contact Phone #** _____

IV. Emergency Contact Information (this information will be used if needed for emergency situations)

Name/Address

Phone: (_____) _____

Relationship to Head of Household: _____

V. Asset Information:

Include all assets held and the corresponding annual interest rate, dividends or any other income derived from the asset. An asset is defined as any lump sum amount that you hold and have access to. Include the value of the asset and corresponding income from the asset in the space provided. **Include ALL assets held by ALL household members listed on this application, including minors.**

**Do YOU or ANYONE listed on this application have the following ASSETS:
Check either YES or NO to each question.**

<u>YES</u>	<u>NO</u>																					
o	o	1. Checking or savings accounts? (Do not include 529 / 530 Educational Savings Accounts) (SHD103)																				
		<table border="0" style="width: 100%;"> <thead> <tr> <th style="text-align: left;"><u>Household Member</u></th> <th style="text-align: left;"><u>Type of Account</u></th> <th style="text-align: left;"><u>Institution Name & Phone #</u></th> <th style="text-align: left;"><u>Account #</u></th> <th style="text-align: left;"><u>Amount</u></th> </tr> </thead> <tbody> <tr> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> <tr> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> <td>_____</td> </tr> </tbody> </table>	<u>Household Member</u>	<u>Type of Account</u>	<u>Institution Name & Phone #</u>	<u>Account #</u>	<u>Amount</u>	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____	_____
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_____	_____	_____	_____	_____																		
_____	_____	_____	_____	_____																		
_____	_____	_____	_____	_____																		
o	o	2. CDs, money market accounts or treasury bills? (SHD 102)																				
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_____	_____	_____	_____	_____																		
_____	_____	_____	_____	_____																		
o	o	3. Trust Fund(s) which is under control of a Household Member?																				
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<u>Household Member</u>	<u>Type of Account</u>	<u>Institution Name & Phone #</u>	<u>Account #</u>	<u>Amount</u>																		
_____	_____	_____	_____	_____																		
_____	_____	_____	_____	_____																		

YES NO

o o **4. Stocks, bonds or mutual funds? NOTE: This does not include retirement accounts. (SHD102)**

<u>Household Member</u>	<u>Type of Account</u>	<u>Institution Name & Phone #</u>	<u>Account #</u>	<u>Amount</u>
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____
_____	_____	_____	_____	_____

o o **5. Cash on Hand (SHD122)**

Household Member(s): _____

Amount(s): _____

o o **6. Savings Bonds (Do not include Baby Bonds)**

Household Member(s): _____

Amount(s): _____

o o **7. Real estate including a primary residence, farm, vacant land, vacation home, rental property, commercial space, or other real estate investments? (SHD112)**

<u>Household Member</u>	<u>Address of Property</u>	<u>Fair Market Value</u>	<u>Balance Owed on Mortgage</u>
_____	_____	_____	_____

o o **8. Payments under a land contract? (If yes, attach a copy of amortization schedule.)**

o o **9. Non-necessary personal property? (Paintings, coin collections, artwork, boat, camper, luxury jewelry, etc.)**

<u>Household Member</u>	<u>Type of Personal Property</u>	<u>Value</u>
_____	_____	_____
_____	_____	_____

o o **10. Safe Deposit Box? (SHD122)**

Household Member(s): _____

Contents: _____

Monetary Value of Contents: _____

o o **11. Whole life insurance policy? (Term life insurance policies are not included) (SHD102)**

<u>Household Member</u>	<u>Source & Phone #</u>	<u>Policy #</u>	<u>Cash Value</u>
_____	_____	_____	_____
_____	_____	_____	_____

o o **12. Received any lump sum payments in the last 24 months? (Settlements, inheritance, lottery, etc.) (SHD145)**

<u>Household Member</u>	<u>Type of Lump Sum</u>	<u>Amount</u>	<u>Where is Money Located?</u>
_____	_____	_____	_____
_____	_____	_____	_____

YES NO

 13. Have you or any household member disposed of or given away any asset(s) for LESS than fair market value within the past 2 years? Example: Giving away an asset (such as cash or a car) and not receiving anything in return, donations to a charity, paying bills for someone not in your household, etc. (SHD144)

Household Member: _____

Amount: _____

Explanation: _____

 14. Do you own Cryptocurrency?

<u>Household Member</u>	<u>Amount</u>	<u>Where is the Crypto held? (Such as Robinhood)</u>
_____	_____	_____
_____	_____	_____

 15. Do you have balances in any of the following accounts? Sources include Pre-paid debit cards, Venmo, Cash App, Zelle, PayPal, etc.

<u>Household Member</u>	<u>Source</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____
_____	_____	_____

 16. Have you received a Federal Tax Refund in the past 12 months?

<u>Household Member</u>	<u>Source</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

VI. Income Information:

Include all income anticipated for the next 12 months (include employment income for minors turning 18 in the next 12 months) and all other unearned income for minors such as social security benefits.

YES NO

 1. Employment wages or salaries? (SHD110)
(Includes overtime, tips, bonuses, commissions, and payments received in cash)

<u>Household Member</u>	<u>Employer Name, Phone/Email, Contact Person</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 2. Self-employment? *(Copies of last two years tax returns required)* (SHD134)

<u>Household Member</u>	<u>Name of Company</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 3. Regular pay as a member of the Armed Forces, including housing allowance? (SHD101)

<u>Household Member</u>	<u>Branch of Service, Phone Number</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

YES NO

- 4. Unemployment benefits?**
Household Member Source, Phone Number Amount

- 5. Public Assistance, General Relief or W-2? (SHD121)**
Household Member Source, Phone Number Amount

- 6. Do you receive child support?** *(List the amount(s) you typically receive, not what is court ordered).*
(SHD106)
Household Member Payor's Name, County Amount

- 7. Do you receive alimony?** *(List the amount(s) you typically receive, not what is court ordered).*
(SHD139)
Household Member Payor's Name Amount

- 8. Social Security, SSI or any other payments from the Social Security Administration?**
(Please do separate line items for Federal and State payments) (SHD135)
Household Member Source Amount

- 9. Pensions, annuities, or other retirement benefits?** (SHD120)
Household Member Name of Company, Phone Number, Contact Amount

- 10. Veteran's benefits? Please note amounts for "Aid & Attendance Pay are Excluded"**
(SHD136)
Household Member Source and Phone # Amount

- 11. Severance payments?** (SHD119)
Household Member Name of Company, Phone #, Contact Name Amount

- 12. Disability, death benefits or life insurance dividends?** (SHD102)
Household Member Name of Company, Phone #, Contact Name Amount

- 13. Do you receive regular gifts or payments from anyone outside of the household?**
(This includes anyone supplementing your income or paying any of your bills.) SHD118 & 119
Household Member Source, Phone Number Amount

YES NO

 14. Payments from rental property or other forms of real estate? (SHD112)

<u>Household Member</u>	<u>Address of Property</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 15. Any other income sources or types not listed (currently or in the next 12 months)?

<u>Household Member</u>	<u>Source, Phone Number</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 16. Student Financial Aid Received from the Higher Education Act (HEA)? (SHD141 & 142)

Do you receive student financial assistance from the Higher Education Act (HEA) Part 479B or the Bureau of Indian Education? (ex. Federal Pell Grants, Teach Grants, Federal Work Study, Higher Education tribal grants, etc.)

<u>Household Member</u>	<u>Source, Phone Number</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 17. Student Financial Aid Received from other sources? (SHD141 & 142)

Do you receive student financial assistance from any other sources other than the HEA from the question above? (ex. State or Local Grants, Grants/Scholarships from a Business, Grants/Scholarships from an Institute of Higher Education, etc)

<u>Household Member</u>	<u>Source, Phone Number</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

 18. Do you receive regular and/or periodic disbursements and/or required minimum distributions from any retirement accounts? (SHD120)

<u>Household Member</u>	<u>Source, Phone Number</u>	<u>Amount</u>
_____	_____	_____
_____	_____	_____

VII. Zero Income Verification:

Are YOU or is ANY OTHER ADULT member of your household:

YES NO

 1. Claiming zero income? If so, who? _____
(SHD137)

VIII. Live-In Care Attendant:

YES NO

 1. Will you or anyone in your household require a live-in care attendant? (Proof from doctor is required) (SHD115)
Name of Live-in Care Attendant and Relationship if any: _____

All live-in care attendants must undergo a background check and pass all resident selection criteria except for criteria in relation to credit. Live in care attendants that are related to the applicant/tenant may be required to meet program eligibility in terms of income eligibility.

IX. Marital Status Information: (SHD116)

YES **NO**

1. **Are you currently separated, but not divorced from your spouse?**

IF YES, CONTINUE WITH THE FOLLOWING QUESTIONS:

- a. **Are you legally separated from your spouse?**
(If yes, attached copy of current legal separation agreement.)
- b. **Have you pursued legal action?**
If not, list reason: _____
- c. **Do you currently receive any monetary support from your spouse?**
If yes, list monthly amount received: _____

X. Rental Assistance: (SHD113)

YES **NO**

1. **Will your household be receiving Section 8 rental assistance at the time of move-in?**

Name of Agency and Contact Person: _____

2. **Will your household be eligible or are you applying to receive Section 8 rental assistance in the next 12 months?**

Explanation: _____

3. **Will your household receive any other type of rental assistance in the next 12 months?**

Explanation: _____

XI. Student Status: (SHD138)

YES **NO**

1. **Are any household members currently students or will they become students in the next 12 months?** (SHD138)

Household Member Name _____ Full or Part Time _____
Name of School _____ Enrollment Dates _____

Household Member Name _____ Full or Part Time _____
Name of School _____ Enrollment Dates _____

Household Member Name _____ Full or Part Time _____
Name of School _____ Enrollment Dates _____

Household Member Name _____ Full or Part Time _____
Name of School _____ Enrollment Dates _____

XII. Signature Clause:

I/We understand that management is relying on this information to prove my/our household's eligibility for the Low-Income Housing Tax Credit Program and any associated supportive housing programs. I/We certify that all information and answers to the above questions are true and complete to the best of my/our knowledge. I/We consent to release the necessary information to determine my/our eligibility. I/We understand that providing false information or making false statements is grounds for denial of my/our application as well as forfeiture of all application fees and deposits as liquid damages for time and expense, as well as termination of my/our right of occupancy. I/We also understand that such action may result in criminal penalties.

I/We authorize my/our consent to have management verify the information contained in this application for purposes of proving my/our eligibility for occupancy. I/We will provide all necessary information and expedite this process in any way possible. I/We understand that occupancy is contingent on meeting management's resident selection criteria and the Low-Income Housing Tax Credit Program requirements.

I acknowledge that copies of the Rental Agreement, Rules & Regulations and Non-Standard Rental Provisions (if applicable) were made available to me. I agree to sign all of these forms prior to taking occupancy of the unit.

All ADULT household members must sign below:

_____ Signature of Applicant	_____ Date
_____ Signature of Applicant	_____ Date
_____ Signature of Applicant	_____ Date
_____ Signature of Applicant	_____ Date
_____ Signature of Property Manager/Leasing Agent	_____ Date



Authorization Release of Information

PROPERTY ADDRESS: 2232 W Broadway, Madison, WI 53713

Date: Apt. No.: Development Name: Royal Apartments Applicant/Resident Name(s):

TELEPHONE NUMBER: 608-205-4424

FAX NUMBER: 608-205-5120

I/We, see below, hereby authorize the release of any information requested by the above-named property. I/We understand and agree that photocopies of this authorization may be used for the purposes stated below. Signature Date Last 4 digits Social Security #

Terms and Conditions

By my/our signature above, I/we hereby indicate my/our desire to lease an apartment from Stone House Development, Inc. I/We do also hereby consent to and authorize any representative of Stone House Development, Inc. or the above-mentioned development to obtain, verify and exchange information or any reports concerning me/us as are maintained by, but not limited to: City, County, State, Federal law Enforcement Agencies, Credit Reporting Agencies, present and/or past employers, present and/or past residences and educational institutions. I/We understand that any information obtained may be considered by Stone House Development, Inc. at their sole discretion, as a factor in any decision they make with respect to the apartment for which I am making the application.

Furthermore, I/We authorize Stone House Development, Inc. or the above-mentioned development to obtain information regarding my/our income, assets, and household status for purposes of determining my/our eligibility for participation in the Low-Income Housing Tax Credit Program. I understand that any information obtained may be considered by Stone House Development, Inc. at their sole discretion, as a factor in any decision they make with respect to the apartment for which I am applying.

Furthermore, I/we hereby release and hold harmless the above named organization, its subsidiaries or managing agents, including but not limited to their officers, directors, employees, agents, Law Enforcement Agencies, Credit Reporting Agencies, present and/or past employers, present and/or past residences, its officers and employers that shall provide information to the above named organization, its subsidiaries or managing agents from and against any and all claims, demands, suits or expenses arising from or related to the content, validity or handling of said reports.

This release for information will expire thirteen (13) months from the date of signature.



Resident Selection Criteria

The purpose of our resident selection criteria is to inform you of our screening processes and guidelines when determining your eligibility.

It is our declared policy that all persons shall have an equal opportunity for housing regardless of gender, race, color, sexual orientation, disability, religion, national origin, marital status, family status, lawful source of income, age, ancestry, physical appearance, political beliefs, military discharge, gender/genetic identity, domestic partnership status, student status (unless allowed by program restrictions), receipt of rental assistance, citizenship status, mental & physical disability and being a victim of domestic abuse and other crimes.

Applications are accepted in the order in which they are received and may take up to 21 days to be fully processed. If you are denied for any reason, you have the right to reapply after 90 days or appeal the decision (instruction for which would be outlined in the letter of denial.)

I. Your application can be denied if one or more of the following pertain to you:

1. You provided false or misleading information on your application.
2. You do not meet our occupancy standards of no more than 2 persons per bedroom. (Children under 2 years of age may be excluded from this restriction.)
3. You do not meet income/program requirements for the Section 42 affordable housing program.
4. The Head of Household or co-head applicant(s) is not at least the age of 18.
5. You have a pending bankruptcy or a bankruptcy that has not been discharged.
6. Your conviction record presents a demonstrable risk to resident and employee safety and/or property. Arrest records, without a subsequent conviction will not be considered. If any of the following apply to you, your application may be denied:
 - a) If you have ever been convicted of manufacturing or distributing a controlled substance as defined in Sec. 102 of the Controlled Substances Act, then your application will be denied.
 - b) Registry on the Sex Offenders Registry will be a basis for the denial of your application. NOTE: Discretion will be given for certain offenses and misdemeanors where reporting is not automatically required.
 - c) If you have been convicted of any other crime that shows a demonstrable risk to tenant safety and/or property within the past 10 years, your application may be denied after consideration of the nature and severity of the crime and the amount of time that has passed since the criminal conduct occurred. Additional factors may also be considered on a case-by-case basis. Along with your application, you may provide any mitigating information or documentation that you would like to have considered regarding any prior conviction.

7. You have been evicted from an apartment within the past 2 years, are currently being evicted from an apartment, have a history of 2 or more evictions, currently owe another landlord money or have an unfavorable housing reference within the past 2 years.

II. Your application must also meet our combined criteria for credit, employment, and rental references.

- 1) CREDIT HISTORY: You must have no more than 3 accounts that have been reported to a collection agency, placed for collection in the past 2 years and the address on your credit report (current and past) must match that on the application.
- 2) RENTAL/MORTGAGE REFERENCES: You must have at least 2 years of a positive housing/mortgage reference within the past 3 years. NOTE: Family housing references are not accepted.
- 3) EMPLOYMENT / INCOME: You must be able to prove income or available cash assets are at least 1.5 times the amount of the proposed monthly rent (your portion). If employment is your prime income source, you must have at least 2 years of current employment history (does not have to be with the same employer). All legal sources of income will be used when calculating household income.

If you do not meet **one** of the above criteria, Landlord may offer other options such as cosigner, full month security deposit, etc. to cover the selection requirement deficiency.

If you do not meet 2 or more of the above criteria, your application will be automatically denied.

I agree that I have read the above-mentioned Resident Selection Criteria and understand that the Landlord will be checking all references relative to income, credit, housing, and criminal conviction record and I give permission to the Landlord to make these inquiries. If denied tenancy, I may reapply after 90 days or request an appeal form which will allow me to start the appeal process. In the event my application is denied, and the decision is overturned because of an appeal, I understand that the apartment will not be held for me during the appeal process, and I will be placed on the waiting list if one exists.

Signature of Applicant Date

Signature of Applicant Date

Signature of Applicant Date

Signature of Applicant Date



Non-Full Time Student Certification

Development Name: Royal Apartments Applicant Name:

NOTE: Each adult household applicant/resident must complete this form individually to certify eligibility.

Initial all statements that apply:

- I have not been enrolled in school in the past 12 months.
I was enrolled in school in the past 12 months (circle one: full time / part time)
Name of Institution:
I will not become a full-time student in the next 12 months.

- 1. Is there any member of the household who is not a full-time student? YES NO
2. Are you married and entitled to file a joint federal income tax return? YES NO
3. Are you a single parent and neither you nor any of your children are claimed as dependents of any other person? YES NO
4. Are you receiving Aid to Families with Dependent Children (AFDC or TANF)? YES NO
5. Are you enrolled in a job training program receiving assistance under the Job Training Partnership Act or funded by a State or Local government agency? YES NO
6. Has any student formally received FosterCare assistance? YES NO

If you are, have been or will be attending classes at an educational institution or are pursuing a full-time course of institutional on-farm training under the supervision of an accredited agent of an educational organization or of a state or political subdivision of a state during at least five months of the taxable year in which you will occupy the unit (The five calendar months need not be consecutive) AND:

- 1) You answered NO to all questions above, you are not eligible to rent a low-income apartment as defined under section 42 of the Internal Revenue Code.
2) You marked YES to at least one of the above, please indicate the name of the school(s) you are attending:

I certify that the information and statements provided above are true and complete to the best of my knowledge and belief. I consent to release the information in order to qualify for Section 42 Housing. I understand that providing false information or making false statements may be grounds for denial of my application and may subject me to criminal penalties. I understand applicants/residents must be eligible for the Section 42 Tax Credit Program.

Applicant Signature

Date



Student Status Verification

To: _____

Date: _____ Apt No _____
Development Name: _____
Applicant/Resident Name: _____
Student Name: _____

Telephone Number: _____

Email / Fax: _____

From: Stone House Development, Inc.
1010 E. Washington Ave Suite 101
Madison, WI 53703
P: 608.251.6000 F: 608.251.6077

I, _____, hereby authorize the release of any income, asset or eligibility information.

Please complete the following information and return it as soon as possible. This information will be used to determine the applicant's eligibility for housing and occupancy in a development governed by the Low-Income Housing Tax Credit Program. Due to federal regulations, we must verify all income, assets, and student information for applicants seeking housing under this Program.

Please complete all information to the best of your ability.

- 1. Is the above-mentioned individual a student at this Educational Institution? Yes No
2. Is the above-mentioned individual a FULL-TIME student defined by your institution?
3. Is the above-mentioned individual registered as a FULL-TIME student in the next 12 months? If YES, what are the dates of enrollment?
4. Total Cost of Tuition Per Year? \$
5. TOTAL FINANCIAL ASSISTANCE COVERED UNDER TITLE IV HEA (34 CFR 668.1(c)): \$

Table with 4 columns: SOURCE, AMOUNT PER YEAR, SOURCE, AMOUNT PER YEAR

6. ANY OTHER ASSISTANCE NOT COVERED UNDER TITLE IV HEA: \$
Including but not limited to: grants or scholarships received from the federal government; a state, tribe, or local government; a private foundation registered as a nonprofit under 26 U.S.C. 501 (c)(3); a business entity or an institution of higher education.

Table with 4 columns: SOURCE, AMOUNT PER YEAR, SOURCE, AMOUNT PER YEAR

7. Was the above-mentioned person a FULL-TIME student as defined by your institution within the last 12 months
If YES, what were the enrollment dates?

Comments: _____

Signature of Person Verifying Information

Print Name of Person Verifying Information

Title SHD141

Telephone Number

Date



HUD Data Collection Form

Please fill out the following information. All the information you provide will be given to HUD. Please note the completion of this form is voluntary. There is no penalty for persons who do not complete this form.

HOUSEHOLD COMPOSTION

Household Member	Last Name	First Name	Relationship to Head of Household (See Coding Below)	Date of Birth	Full-Time Student (Y or N)	Last 4 digits of Social Security Number	Race (See Coding Below)	Ethnicity (See Coding Below)	Disabled (Y or N)
1			Head of Household						
2									
3									
4									
5									
6									

Relationship to HH

H – Head of Household

S – Spouse

A – Adult Co-Tenant

O – Other Family Member

C – Child

F – Foster Child(ren)

L – Live-In Caretaker

N – None of the Above

Race

1 – White

2 – Black / African American

3 – American Indian / Alaska Native

4 – Asian

5 – Native Hawaiian / Other Pacific Islander

Ethnicity

1 – Hispanic or Latino

2 – NOT Hispanic or Latino

