



SCHWENCKFELD
MANOR
An Advanced Living Community

Dear Applicant:

Attached is the preliminary application for Schwenckfeld Manor. The application has four sections: (1) Preliminary Information, (2) Citizenship/ Immigration Status, (3) Race and Ethnic Data, and (4) Student Certification. There is also an informational page titled "Applying for HUD Housing Assistance?"

Answer all the questions according to the instructions. Each section must be completed, signed and dated, even if you feel that you have given the same information somewhere else. The most common reason for applications being returned is incomplete data. The most common areas left incomplete are the income/assets section and the form asking for citizenship status.

If you have questions, please contact me before you submit the application.

Sincerely,

Mary MacDonald
Director of Occupancy

Below you will find comments and instructions for each section. Please be sure to read the material carefully.

SECTION 1 – PRELIMINARY INFORMATION

General Instructions

Be sure to answer all the questions. If the question does not apply, write "N/A." If the amount is zero, write "0" in the blank.

Do **NOT** change the wording of the questions to suit your situation. If there is special information you would like to communicate, write it on a separate page and include it with the application.

All information reported must be as of the date of the application.

The application must be completed in ink.



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“Name(s) of Apartment Occupant(s)” – this refers to the names of the person(s) applying for an apartment at Schwenckfeld Manor.

“Name of responsible party” – This part is optional; however, it is very helpful to list a family member or good friend. This allows us to have another contact in case we cannot reach you. It would also allow that person to check on the status of your application. It does not mean that the person is responsible for you financially. If you do not wish to list a responsible party, simply fill in N/A.

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List the state(s) in which you have lived since the age of 18. This would be applicable, even if you have lived in only Pennsylvania. If so, please state that.

If you do not have a current landlord, write N/A. If you are living with family or friends, list that person as your landlord.

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If you require an apartment with architecturally altered features, there is a list of things that our apartments provide. Please check what feature(s) you need.

Under “**Income**,” all questions should be answered with **yearly information**, and then declare the total income for the year. Income listed must be as of the date of application. If you expect your income to change significantly in the near future, answer with current figures and include a note as to the expected change.

Gross Soc. Sec. - Social Security should be stated as the *gross* yearly amount (the monthly figure before the cost of Medicare is deducted x 12 months).

S.S.I. This is supplemental income for very low income people. Not everyone will have S.S.I. If it does not apply to you, write N/A.

S.S.P. is a state supplement that will be received along with your S.S.I. benefit.

“**Interest**” must be reported for all savings, CDs, IRAs, bonds and other interest bearing investments.

“**Dividends**” must be reported for all stocks and mutual funds.

“**Wages**” should be the gross (before taxes and other deductions) that you are currently earning, calculated in a yearly amount.

“**Other**” is any income of any kind that is not covered by the topics listed. If anyone gives you money or pays any bills for you on a regular basis, you must declare it as income.

Assets:

“Cash” is whatever amount you have in your wallet/pocketbook, in your home, safety deposit box or anywhere else you have actual cash (**not** what is in bank accounts).

“Checking” is an estimate of the average balance in your checking account over the last 6 months.

“Savings” refer to the balance on the last statement(s) you received from the bank and/or the most current balance on your passbook(s).

IRAs refer to your last statement for the most current balance. If there is no statement, refer to your end of the year figures on your IRS form 1099.

“Cash Value” on insurance policies can easily be obtained by contacting your insurance broker or insurance company. “Cash Value” means the amount you would receive if you cancelled the policy today. If you have a life insurance that does not have a cash value (a term insurance), you would answer this as N/A.

“Other” is any assets that you have that are not listed on the application, such as coin collections that you collect as an investment. It does not mean things like cars, personal jewelry, etc. If you are not sure of something, you can check with the Admissions Department.

If you have an **annuity**, you should call to discuss how to declare this.

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If you answer “Yes” to the first question on this page, “Are you enrolled as a student in an institute of higher education?” please complete the “Student Certification” at the end of the application.

Disposing of **“any asset at less than fair market value”** means selling or giving away items for less than they would normally bring (such as giving an asset to a relative or selling it to a friend for less than you would normally be able to sell it. It can also mean giving away money to anyone like children or grandchildren or even a charitable organization). If you sold something at less than fair market value, list the difference between the amount you could have charged, but did not, and the money actually received in “money given away.” If you gave away cash only, list that as the asset disposed of and the amount.

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Sign and date this page. Applicant #1 should be the same individual as #1 under “Name(s) of Apartment Occupant (s)” on page 1. If applicable, Applicant #2 should be Occupant #2.

SECTION 2 – CITIZENSHIP/IMMIGRATION STATUS

Section 214 of the Housing and Community Development Act of 1980, as amended, prohibits the Secretary of HUD from making financial assistance available to persons other than United States citizens, nationals, or certain categories of eligible non-citizens, in the following HUD programs.

- a. Section 8 Housing Assistance Payments programs;
- b. Section 236 of the National Housing Act including Rental Assistance Payment (RAP).

You have applied, or are applying for assistance under one or both of these programs; therefore, you are required to declare U.S. Citizenship or submit evidence of eligible immigration status for each of your family members for whom you are seeking housing assistance. You must do the following.

Since you are applying to Schwenckfeld Manor, you are required to declare U.S. Citizenship or submit evidence of eligible immigration status for each apartment occupant. **This must be completed by each applicant, even if you were born in the United States.**

1. **Complete** – FAMILY SUMMARY SHEET. List **only the name of family members who are applying to live at Schwenckfeld Manor**. They should be in the same order as on page 1 of the application.
2. **Complete** – DECLARATION.
Each family member (including you) listed on the Family Summary Sheet must complete a Declaration. If there are 2 people listed on the Family Summary Sheet, you should have 2 completed copies of the Declaration. See instructions below.

(a) If you are a U.S. citizen/national then:

Each applicant must complete a separate DECLARATION. Complete the first page only.

- (1) Complete the top section of page 1, down to and including the social security number.
- (2) Under DECLARATION, put your name after the word "I", then print your name on the next line as well.
- (3) Put a check mark next to #1
- (4) Sign and date it.
- (5) Indicate with a check mark if you are signing for a child.

(b) If you are a non-citizen with eligible immigration status, then:

- (1) Each applicant must complete a separate DECLARATION.
 - (a) Complete the top of half of the page, including ALIEN REGISTRATION NUMBER. Under DECLARATION, write your name and on the next line print your name.
 - (b) Check #2 on the next page and follow the instructions that are listed.
- (2) On the last page fill in the Verification Consent Form, if you are under 62 years of age.
 - (a) Print your name under CONSENT.
 - (b) Sign and date it.
 - (c) Indicate with a check mark if you are signing for a child.
- (3) If you need additional time to obtain any of the necessary evidence, sign and date the REQUEST FOR EXTENSION box on page 3.

Submit the Family Summary Sheet, the Declarations, and any other forms and/or evidence in person to the name and address listed below by the time of the submission of the completed application.

(c) If you do not have eligible immigration status, then:

- (1) Each applicant must complete a separate DECLARATION.
 - (a) Complete the top half of the page. Under Declaration put your name and on the next line print your name.
 - (b) Check #3 on the last page and sign and date it.

This Section 214 review will be completed in conjunction with the verification of other aspects of eligibility for assistance. If you have any questions or difficulty in completing the attached items or determining the type of documentation required, please contact the Admissions Department at 215-362-0227. He/she will be happy to assist you. Also, if you are unable to provide the required documentation by the date shown above, you should immediately contact this office and request an extension, using the block provided on the Declaration Format. Failure to provide this information or establish eligible status may result in your not being considered for housing assistance.

If the Section 214 review results in a determination of ineligibility, you will have an opportunity to appeal the decision. Also, if the final determination concludes that only certain members of your family are eligible for assistance, your family may be eligible for pro-ration of assistance. That means that when assistance is

available, a reduced amount may be provided for your family based on the number of members who are eligible.

If assistance becomes available and the other aspects of your eligibility review show that you are eligible for housing assistance, that assistance may be provided to you if at least one member of your household has submitted the required documentation. Following verification of the documentation submitted by all family members, assistance may be adjusted depending on the immigration status verified. You will be contacted as soon as we have further information regarding your eligibility for assistance.

SECTION 3 – RACE AND ETHNIC DATA

Race and Ethnic Data Reporting Form

Filling in this form is voluntary; however, HUD requires that we compile this information for the purpose of assessing our Affirmative Fair Housing Marketing Plan.

Complete this form starting with the 3rd line. Put your name above “Name of Head of Household,” and also put your name on the same line above “Name of Household Member.” On the next line, enter the date. **Check one box under Ethnic Categories, and under Racial Categories check all boxes that apply.** At the bottom of the page, sign and date it.

If there are two applicants, there is a second Race and Ethnic Data Reporting Form. The second applicant should complete this form starting with the 3rd line. Put the “Name of Head of Household,” and, on the same line at the right, put the name of the second applicant above “Name of the Household Member.” On the next line, enter the date. Check one box under Ethnic Categories, and under Racial Categories check all boxes that apply. At the bottom of the page, sign and date it.

SECTION 4 – STUDENT CERTIFICATION

Complete this page if you answered “Yes” to the first question on Page 4.

If you have any questions, our office hours are 8:30 a.m. to 4:00 p.m., Monday thru Friday, and our phone number is 215-362-0227. We also have available, for those who are hearing impaired, a toll free number (1-800-654-5984), through the Pennsylvania Telecommunications Relay Service.

WHEN ALL SECTIONS ARE COMPLETED, SIGNED AND DATED, THEN RETURN TO:

**ADMISSIONS
SCHWENCKFELD MANOR
1290 ALLENTOWN ROAD
LANSDALE, PA 19446**