

**PRELIMINARY INFORMATION**

Date: \_\_\_\_\_ Time: \_\_\_\_\_ Interested In:  Ashland Manor  
 Olde Towne Manor  
 New Hope Manor

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

Address: \_\_\_\_\_

Phone: \_\_\_\_\_ Handicapped:  Yes  No No Pet Policy

Move-In Date: \_\_\_\_\_ F/T Student:  Yes  No Sect. 8:  Yes  No

✓ Income Verification

- Employment (Gross Wages/Yr.): \$ \_\_\_\_\_
- Unemployment/Welfare: \$ \_\_\_\_\_
- Social Security (Gross Amt./Yr.): \$ \_\_\_\_\_
- Pension (Gross Amt./Yr.): \$ \_\_\_\_\_
- Other (Gross Amt./Yr.): \$ \_\_\_\_\_

Income Sub-Total: \$ \_\_\_\_\_

Asset(s) Verification\*

Qty.	Balance/Value	Interest Rate	Income
<input type="checkbox"/> Checking Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Savings Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Money Mkt. Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Cert(s) Of Deposit:	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Annuity(ies):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Bond(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Stock(s):	\$ _____	Dividends	= \$ _____
<input type="checkbox"/> Mutual Fund(s):	\$ _____	Capital Gains/Dividends	= \$ _____
<input type="checkbox"/> Life Insurance:	\$ _____	( Dividends )	= \$ _____
<input type="checkbox"/> Other	\$ _____		= \$ _____

Cap Gains/Int./Div. Sub-Total: = \$ \_\_\_\_\_

Real Estate: \$ \_\_\_\_\_ Appraised Value -- OR --

Total Asset(s) Value: = \$ \_\_\_\_\_ x 0.40 % = \$ \_\_\_\_\_

(Imputed Income)

TOTAL ANNUAL INCOME: \$ \_\_\_\_\_

QUALIFIED:  Yes  No

\*See Back Of This Sheet For Additional Accounts

## Instructions

Complete the entire sheet, should you have any questions regarding any of the information, please don't hesitate to contact the office at 215-295-1143, Ext. 11, Marge Reca, or Ext. 10 Marilee Gillespie.

### 1. Income:

- A. **Employment:** Gross annual amount from your paycheck stub or a W-2.
- B. **Unemployment/ Welfare:** the amount you receive, plus taxes if you have taxes withheld, multiply the total by 12 months or the amount of time you will receive in the current year, if less than 12 months.
- C. **Social Security:** Current gross annual amounts (before Medicare is subtracted). Either reference your W-2 from Social Security for the prior year, or take the amount received every month, plus the Medicare payment each month and total. Then multiply that total by 12 (months).
- D. **Pension:** Current gross annual amounts (before deductions are subtracted, i.e. union dues, medical benefits, etc.). Either, use your 1099 from Pension company, or, take the amount received every month + (plus) any deductions subtracted each month and total. Then multiply that total by 12 (months).

Add Employment, Unemployment, Social Security and Pension amounts and place in  
Income  
Sub-Total

### 2. Assets:

- A. **Checking, Savings, Money Markets, Certificates of Deposit, Bonds:** multiply the balance/value by the interest rate.
- B. **Annuities:** the interest rate by the cash value, or any gains on your 1099 tax form.
- C. **Stocks:** Dividends from on your 1099.
- D. **Mutual Funds:** Dividends and/or Capital Gains on monthly statement or prior year's 1099 tax form.
- E. **Life Insurance:** Dividends from a 1099 tax form.

1. Add first 9 (nine) assets income from last column on right and put amount in Cap Gains/Int./Div. Sub-Total.

- F. **Real Estate:** Appraised value as stated

3. Add all assets balances and values and then multiply by 2.00% for the Total Assets Value (imputed income)

4. Add the Income Sub-Total and either the Cap Gains/Int./Div. Sub-Total or the Total Asset(s) Value (imputed income), which either is the greater amount and write that amount on the Total Annual Income line.

If your Income is less than \$48,200 for a single person, or \$55,000 for 2 persons you then qualify to apply at New Hope Manor for our 1-bedroom apartments for median income individuals.

If your Income is less than \$24,100 for a single person, or \$27,500 for 2 persons you then qualify to apply for our 1-bedroom apartments for low-income individuals.