

ARBOR TERRACES RENTAL APPLICATION

Apartment Size Desired: ☐ 1-Bedroom

List all household members to occupy the apartment (include yourself). Use full legal names.

Member #	Relationship to Head of Household	Name First, Middle Initial, Last	Social Security Number	DOB (mm/dd/yyyy)	M/F
Member #1					
Member #2					

Current Address: _____

Daytime Phone: _____ Evening Phone: _____

YES ☐ NO ☐

1. Is there anyone living with you now who won't be living with you at this property?
Name and Relationship: _____
Explanation: _____

YES ☐ NO ☐

2. Do you expect any additions to the household within the next twelve months?
Name and Relationship: _____
Explanation: _____

YES ☐ NO ☐

3. Do you have full custody of your children?
Explanation: _____

YES ☐ NO ☐

4. Have you or any one else named on this application filed for bankruptcy?
Explanation: _____

YES ☐ NO ☐

5. Have you or any one else named on this application been convicted of a felony?
Explanation: _____

YES ☐ NO ☐

6. Have you or any one else named on this application been convicted for dealing or manufacturing illegal drugs?
Explanation: _____

YES ☐ NO ☐

7. Have you or any one else named on this application been convicted of property damage?
Explanation: _____

YES ☐ NO ☐

8. Have you or any one else named on this application been evicted from a rental unit of any type including an apartment, home, mobile home or trailer?
Explanation: _____

YES ☐ NO ☐

9. Will any adult household member require a live-in care attendant to live independently? If yes list below:
Name of attendant: _____ Relationship (if any): _____

YES ☐ NO ☐

10. Do you or anyone in your household require a barrier free unit?
Household Member: _____
Explain: _____

YES ☐ NO ☐

11. Do you or anyone in your household require any special features/accommodations in the unit?
Household Member: _____
Explain: _____

YES ☐ NO ☐

12. Does your household have or anticipate having any pets other than those used as a service animal?
Explanation: _____

YES ☐ NO ☐

13. Will your household be receiving Section 8 or any other rental assistance? If yes, list below:
Name of Agency: _____
Contact Person: _____ Contact Phone Number : _____

Landlord History: List the past 5 years of housing references. (If additional space is needed use the back of this page.)

OWN

RENT

☐

☐

Landlord's

Name/Address/Phone

AMOUNT PAID:

\$

Name:

Address:

Phone:

Your Address:

FROM

TO

Subsidized Rent (voucher)?

Yes

No

Move-In

Move-Out

OWN

RENT

☐

☐

Landlord's

Name/Address/Phone

AMOUNT PAID:

\$

Name:

Address:

Phone:

Your Address:

FROM

TO

Subsidized Rent (voucher)?

Yes

No

Move-In

Move-Out

OWN

RENT

☐

☐

Landlord's

Name/Address/Phone

AMOUNT PAID:

\$

Name:

Address:

Phone:

Your Address:

FROM

TO

Subsidized Rent (voucher)?

Yes

No

Move-In

Move-Out

References: List a personal reference other than a relative:

Name:

Relationship:

Address:

Phone:

Name:

Years Known:

Address:

Relationship:

Phone:

Years Known:

Vehicle Identification: List vehicle information for all vehicles that are owned or operated by any household member:

Make/Model/Year

Tag/License Plate#

State Issued

Vehicle #1

Vehicle #2

Emergency Contact: List someone in the area that is not already on the application:

Name:

Phone Number:

Address:

Relationship:

Years Known:

DO NOT USE WHITE-OUT.

Income Information

List income for anyone 18 or older (unless legally emancipated). You must also list all unearned income such as a grant or benefits for all household members including minors. Include income anticipated for the next 12 months.

Do YOU or ANYONE in your household have:

Yes No 14. Employment wages or salaries? (include overtime tips, bonuses, commissions & payments
☐ ☐ received in cash.)

<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
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City:	State:	Zip Code:
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<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
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City:	State:	Zip Code:
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<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
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City:	State:	Zip Code:
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<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
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City:	State:	Zip Code:
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<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
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City:	State:	Zip Code:
-------	--------	-----------

<u>Household Member #</u> (From Page 1)	<u>Name of Company</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Company Address:			
------------------	--	--	--

City:	State:	Zip Code:
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Yes No 15. Self-employment? (include overtime tips, bonuses, commissions & payments received in cash.)
☐ ☐

<u>Household Member #</u> (From Page 1)	<u>Type of Business</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Yes No 16. Regular pay as a member of the Armed Forces
☐ ☐

<u>Household Member #</u> (From Page 1)	<u>Base Name and Branch</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

DO NOT USE WHITE-OUT.

Yes No 17. Unemployment benefits or workers' compensation?

☐	☐
<u>Household Member #</u> (From Page 1)	<u>Contact Person</u>
	<u>Phone #</u>
	<u>Amount (per month)</u>
	\$

Yes No 18. CALWORKS, General Relief, TANF, etc.

☐	☐
<u>Household Member #</u> (From Page 1)	<u>Contact Person</u>
	<u>Phone #</u>
	<u>Amount (per month)</u>
	\$

Yes No 19. (a) Child Support or Alimony?

☐	☐
<u>Household Member #</u> (From Page 1)	<u>Payer</u>
	<u>Phone #</u>
	<u>Amount (per month)</u>
	\$
	\$

(b) Is the support received from: (check all that apply)

Child Support Enforcement Agency	Name of Agency: _____
Court of Law	Name of Court: _____
Directly from the individual	Name of Person: _____
Other	Explain: _____

YES NO (c) If money is not actually received, are you taking legal action? (explain)

☐

☐

YES NO 20. Social Security, SSI or any other payments from the Social Security Administration?

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☐

<u>Household Member #</u> (From Page 1)	<u>SSA Office</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 21. Regular payments from a Veteran's benefit, pension, retirement benefit or annuities?

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<u>Household Member #</u> (From Page 1)	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Yes No 22. Regular payments from a severance package?

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☐

<u>Household Member #</u> (From Page 1)	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 23. Regular payments from any type of settlement? (for example, insurance, etc.)

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<u>Household Member #</u> (From Page 1)	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 24. Regular gifts or payments from anyone outside of the household? (includes anyone supplementing your income or paying your bills.)

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<u>Household Member #</u> (From Page 1)	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 25. Educational grants, scholarships, financial aid or other student benefits?

☐

☐

<u>Household Member #</u> (From Page 1)	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

DO NOT USE WHITE-OUT.

Yes No 26. Regular payments from lottery winnings or inheritances?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$

Yes No 27. Regular payments from rental property or other types of real estate transactions?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 28. Any other income sources or types listed?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Source of Benefit</u>	<u>Phone #</u>	<u>Amount (per month)</u>
			\$
			\$

Yes No 29. Do you or any other household member expect any changes to your income in the next 12 months?

☐ ☐

Explain: _____

Asset Information

Must list all assets held and the income derive from all household members including minors.

Do YOU or ANYONE in your household have:

Yes No 30. Checking or Savings?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$
			\$
			\$
			\$

Yes No 31. CDs, Money Market Accounts or Treasury Bills?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

Yes No 32. Stocks, bonds, or securities?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$
			\$
			\$

Yes No 33. Trust funds?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

Yes No 34. Pensions, IRA's Keogh other retirement accounts?

☐ ☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

DO NOT USE WHITE-OUT.

Yes No 35. A safe deposit box?

☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Bank or Institution</u>	<u>Account Number</u>	<u>Amount</u>
			\$

Yes No 36. Personal property held as an investment?

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(Includes paintings, coin or stamp collections, artwork, collector or show cars, and antiques.
Does no include your personal belongings such as your car, furniture or clothing.)

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Type of Property</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

Yes No 37. Real estate, rental property, land contracts/contract for deeds or other real estate holdings?

☐

(Includes your personal residence, mobile homes, vacant land, farms, vacation homes or commercial property.)

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Source of Benefit</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

Yes No 38. Cash on hand over \$500.00?

☐

<u>Household Member #</u> <u>(From Page 1)</u>	<u>Source of Benefit</u>	<u>Account Number</u>	<u>Amount</u>
			\$
			\$

Yes No 39. Have you or any other household members disposed of or given away any asset(s) for less than
☐ fair market value within the last two years?

Household Member:

Amount:

Explain:

Yes No 40. Are you or any other adult household members currently a full-time student or expect to be one in
☐ the next twelve months? If yes, list below:

Household Member:

Explain:

Signature Clause:

I understand that management is relying on this information to prove my household's eligibility for the Low Income Housing Tax Credit Housing Program. I certify that all information and answers to the above questions are true and complete to the best of my knowledge.

I consent to release the information necessary to determine my eligibility. I understand that providing false information or making false statements may be grounds for denial of my application. I also understand that such action may result in criminal penalties.

I authorize and consent to have management verify the information contained in this application. I will provide all necessary information including source names, addresses, phone numbers, and account numbers where applicable and any other information required for expediting this process. I understand that my occupancy is contingent on meeting management's resident selection criteria and the Housing Program requirements.

ALL ADULT household members must sign below:

Signature: Date:

Signature: Date:

Signature: Date:

Management: Date:

If you require assistance in submitting you application, please call (408) 251-7570.



ARBOR TERRACES SENIOR APARTMENTS (55+)
Application Qualification Criteria
(Low Income Housing Tax Credit Program)

Arbor Terraces offers affordable one (1) bedroom apartment homes for seniors age 55 and older.¹ Our Community is governed by the Low-Income Housing Tax Credit Program (LIHTC) and Company Policies to determine eligibility. **Application approval is based upon total annual gross income for the entire household, including income from all assets.**

MAXIMUM INCOME GUIDELINES 2024

* Income limits and Rents are subject to change without notice.

	<u>Very Low Rate</u>	<u>Low Rate</u>
<u>One Person</u>	\$70,350	\$81,960
<u>Two Persons</u>	\$80,400	\$93,720

MINIMUM INCOME REQUIREMENT *:

Gross income must be at least 1.5 X the applicable rental rate. Only out of pocket portion of rent will be counted for households with outside subsidies such as Section 8 Housing Choice Vouchers.

AFFORDABLE RENTAL RATES

* Income limits and Rents are subject to change without notice subject to applicable program requirements.

Tenant portion of rent shall not exceed the maximum allowed by LIHTC or other programs.

	<u>Very Low Rate</u>	<u>Low Rate</u>
<u>1 BEDROOM</u>	\$1,822	\$2,134

Although your household may qualify for more than one of the above rental rates, **we have only a limited number of units available for each income level. Offers will be made based on availability.** Arbor Terraces reserves the right to reclassify your tenancy as a low or very low unit as necessary to ensure the property remains in compliance with all Program Requirements. If the reclassification results in a change in the rent you will pay, you will receive notice of the anticipated change as required by applicable law.

APPLICATION FEE:

A non-refundable application fee (in a **Cashier's Check or Money Order ONLY**) is required to accompany each application as follows:

Each Adult Applicant (18 and over)	\$50.00	Application Fee
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RESIDENT SELECTION CRITERIA:

1. CREDIT HISTORY:

All applicants over the age of 18 must complete a rental application and pay a non-refundable application fee. Applicant(s) must have a favorable credit history, or they may be disqualified. A favorable credit history includes, but is not limited to no negative, slow payments, delinquent accounts, judgments, repossessions, or non-discharged bankruptcy filings. Unpaid or delinquent medical bills will not be considered when evaluating your credit. Unpaid Federal and/or State Liens are considered unfavorable credit. A verified Unlawful Detainer judgment or the providing of false information may also disqualify applicant(s). Lack of credit, however, does not constitute negative or bad credit.



¹ Qualified permanent residents and permitted health care residents as defined by California Civil Code Section 51.3 are also allowed.

Arbor Terraces Senior Apartments
2760 McKee Road, San Jose, CA 95127
Phone: (408) 251-7570 | Fax: (408) 251-7554
Equal Opportunity Housing Provider

2. **RENTAL HISTORY:**

Applicant(s) must have a positive rental history of at least five years. It must be verifiable, with references that include verification of timely rent payments, compliance with rules and regulations and no evidence of any evictions. References from relatives are not acceptable. Lack of a rental history does not necessarily mean a negative rental history.

3. **BEHAVIOR & CONDUCT:**

A history of violence or drug or alcohol abuse or other potentially disruptive behavior as evidenced by either (1) a record of conviction for crimes against a person or property or involving the illegal use or sale of controlled substances; or (2) by documented statements concerning current illegal use or sale of controlled substances, will disqualify an applicant. Incidents more than (5) years old will be considered on a case-by-case basis before selection/rejection decision is made. Mitigating factors considered for incidents over five years old will include the severity and frequency of the offense, the length of time since the offense occurred, and the record of the applicant since the time of the offense.

4. **STABILITY OF RESIDENCE:**

If the applicant demonstrates an unexplainable history of frequent moving or instability in residences, the application may be denied.

5. **HOUSEKEEPING & CARE OF PROPERTY:**

Applicant(s) must have positive references in regard to ability and willingness to maintain the apartment in a clean and sanitary manner and refrain from damaging the unit.

6. **INCOME & ASSET DETERMINATION:**

To verify all aspects of the eligibility process, third party verifications will be obtained from related sources. Length of employment and/or stability may be a factor. **Gross income for the household must be at least 1.5 X the applicable rent. For the purpose of Application Qualification Criteria, only out of pocket portion of applicable rent will be considered count for households with outside subsidies.**

7. **OCCUPANCY STANDARDS:**

Under/over utilization is not permitted and the following occupancy standards will apply.

	<u>MINIMUM NO. OCCUPANTS</u>	<u>MAXIMUM NO. OCCUPANTS</u>
1 BEDROOM	1	2

BASIC QUALIFICATIONS:

1. The total household income must be within the current income guidelines.
2. Family composition must meet occupancy standards set by management (over-crowding or under-utilization is not permitted).
3. Once the screening process has been completed and initial eligibility is determined, you will receive a "Denial of Application" or a "Wait List Application Acceptance" letter.
4. Placement on the Wait List is based on the date and time the application is returned to the rental office.
5. It is the applicant's responsibility to inform management of any changes to the household (i.e., address, household size etc.) in order to remain on the Wait List. Failure to contact the rental office will result in your household being removed from the Wait List.
6. Once the credit screening process has been completed and initial eligibility is determined, you will receive a "Denial of Application" or you will be contacted for initial acceptance and further processing.



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OFFER TO LEASE:

If applying for immediate availability, once you have gathered the necessary documentation for income and asset determination you will need to contact our office to make an appointment for an interview to begin the application process. If there is no immediate availability, when your name is among the top five (5) on the Wait List, you will receive a letter requesting that you contact the rental office to make an appointment to process your application. All members of the household must be present (including minors) at the time of the interview and any subsequent move-in. Failure to present all adult members of the household at the interview, or some other time acceptable to Management, prior to completion of the initial certification may result in the household being disqualified.

An applicant is permitted to decline an offer to lease only once, after the second decline your name will be removed from the Wait List.

AGREEMENT TO HOLD:

Once an offer is made and accepted the household will be required to complete an "Agreement to Hold" and pay the applicable security deposit. If there are any changes to the household occupants, income, or assets prior to move in, Management will not permit occupancy until the changes are documented and verified. The maximum amount of time a vacant apartment will be held is two (2) weeks.

SECURITY DEPOSIT:

All Security Deposits must be paid in the form of a Cashier's Check or Money Order. The Security Deposit amount is equal to the sum of one (1) month total rent charged.

I/WE HAVE READ AND AGREE TO ABIDE BY THE ABOVE CRITERIA:

Signature	Date	Signature	Date
Signature	Date	Signature	Date
Management Signature			Date



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