



your resource for Affordable Housing



Residences at the Masonic Lodge Lottery Information and Application Methuen, MA

Attached is the information regarding the affordable rental units at Residences at the Masonic Lodge in Methuen, Massachusetts. Potential Tenants will not be discriminated against on the basis of race, color, national origin, disability, age, ancestry, children, familial status, genetic information, marital status, public assistance reciprocity, religion, sex, sexual orientation, gender identity, veteran/military status, or any other basis prohibited by law.

Located at 5 Pleasant Street and 275 Broadway in Methuen, Residences at the Masonic Lodge is a new rental development offering 5 affordable one and two bedroom apartments, by lottery, for eligible tenants. 275 Broadway is an existing building and will be fully renovated. 5 Pleasant Street is also an existing building and will be partially renovated. Surface parking is available for all tenants at no charge. All units include an in-unit washer and dryer and one full bathroom. Pets are allowed up to 35lbs. The monthly pet rent is \$35. This is a smoke-free building. Requirements are subject to reasonable accommodation.

The monthly rents are: One Bedroom - \$1,467; Two Bedroom - \$1,583. All utilities are electric. Water and Sewer are included in the rent. A utility allowance has been deducted from the rents. All affordable units will be distributed by lottery as outlined in the attached package

These rents are NOT income based. Applicants are responsible for the full rent as stated above. Section 8 or other housing vouchers will be accepted, and it is up to you to talk with your voucher holder to determine if they will approve the project and accept the rents. The minimum income needed to lease a unit, without a Section 8 or other housing voucher, are: \$44,010 for a one-bedroom unit; \$47,490 for a two-bedroom unit. A combination of Income and Assets may be taken into consideration in meeting the minimum income.

PLEASE NOTE: All applicants must include complete financial documentation with the application. An application will be considered incomplete and will not be included in the lottery if all financial documentation is not received on or before the application deadline.

Applicants who submitted an incomplete application will be notified after the application deadline and will NOT be included in the lottery. Applicants that submit an incomplete application will be notified via email, if available, or by letter. The email or letter will include the list of missing documentation. If you submit the missing documentation and your application is determined complete you would be added to the waiting list. If units remain after the lottery, the available units would then be offered to you based on the date you were added to the waiting list, subject to applicable preferences.

KEY DATES

Public Information Meeting via Zoom

6:30 p.m., Wednesday, December 21, 2022

Go to Zoom.com, click on Join A Meeting and enter the meeting code and password when asked

Meeting ID: 886 4071 8094

Passcode: 075088

Application Deadline

Postmarked on or before January 17, 2023



Lottery via Zoom

3:00 p.m., Friday, February 10, 2023

Go to Zoom.com, click on Join A Meeting and enter the meeting code and password when asked

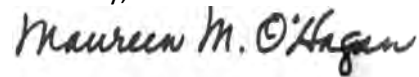
Meeting ID: 881 7007 1249

Passcode: 666912

For those applicants who are unable to attend the live Zoom or otherwise want to review, the meeting will be recorded with those portions not containing unauthorized sensitive personal information, and will be available for viewing up to the application deadline, upon request.

Thank you for your interest in affordable housing at **Residences at the Masonic Lodge**. We wish you the best of luck. Please contact MCO Housing Services at 978-456-8388 or email us at lotteryinfo@mcohousingservices.com if you have any questions. We encourage you to advise other people or organizations that may be interested in this program and make copies of the relevant information as needed.

Sincerely,



Maureen O'Hagan for Residences at the Masonic Lodge



This is an important document. Please contact [AGENCY NAME] at [PHONE #] for free language assistance.

Este documento es muy importante. Favor de comunicarse con el MCO Housing en 978-456-8388 para ayuda gratis con el idioma. (Spanish)

Este é um documento importante. Entre em contato com o MCO Housing Serv no número 978-456-8388 para obter assistência gratuita com o idioma. (Portuguese)

Dokiman sila a enpòtan. Tanpri kontakte MCO Housing la nan 978-456-8388 pou asistans gratis nan lang. (Haitian Creole)

此文件為重要文件。如果您需要免費的語言翻譯幫助，請聯絡 MCO Housing 聯絡方式：978-456-8388 (Chinese, Traditional)

此文件为重要文件。如果您需要免费的语言翻译帮助，请联络 MCO Housing 联络方式：978-456-8388 (Chinese, Simplified)

Это весьма важный документ. Свяжитесь с сотрудником MCO Housing на предмет оказания бесплатной помощи по переводу на иностранный язык (978-456-8388). (Russian)
(Phone #)

នេះគឺជាឯកសារសំខាន់។ សូមទំនាក់ទំនង MCO Housing តាមរយៈ 978-456-8388 ដើម្បីទទួលបានជំនួយ ផ្នែកភាសាដោយឥតគិតថ្លៃ។ [Mon-Khmer, Cambodian]

Đây là một tài liệu quan trọng. Vui lòng liên hệ MCO Housing tại 978-456-8388 để được hỗ trợ ngôn ngữ miễn phí. (Vietnamese)

Kani waa dukumentiyi muhiim ah. Fadlan MCO Housing kala soo xiriir 978-456-8388 si aad u hesho gargaar xagga luqadda oo bilaash ah. (Somali)

هذه وثيقة مهمة. يرجى الاتصال بـ MCO Housing بـ 978-456-8388 للمساعدة اللغوية المجانية. (Arabic)
[Agency Name] [Phone #]

Ce document est très important. Veuillez contacter le MCO Housing au 978-456-8388 afin d'obtenir une assistance linguistique gratuite. (French)

Il presente è un documento importante. Si prega di contattare il MCO Housing al 978-456-8388 per avere assistenza gratuita per la traduzione. (Italian)



Residences at the Masonic Lodge

Question & Answer

The units will be leased in accordance with policies and guidelines established by the Commonwealth of Massachusetts Department of Housing and Community Development (DHCD) through its 40R program.

What are the qualifications required for Prospective Tenants?

- Qualify based on the following maximum gross income table, which is adjusted for household size:

| Household Size | 1 | 2 | 3 | 4 |
|----------------------------|----------|----------|----------|----------|
| Max Gross Allowable Income | \$62,600 | \$71,550 | \$80,850 | \$89,400 |

LOTTERY APPLICANT QUALIFICATIONS:

- Household income cannot exceed the above maximum gross allowable income limits.
- When assets total \$5,000 or less, the actual interest/dividend income earned is included in the annual income OR when assets exceed \$5,000, annual income includes the greater of actual income from assets or a .06% imputed income calculation. Assets divested at less than full market value within two years of application will be counted at full market value when determining eligibility.
- In addition to income and asset eligibility you will also be subject to a screening by the project and determined eligible based on that basis.
- Applicants may not own a home and lease an affordable unit, including homes in a trust.
- Persons with disabilities who need the features of the type of accessible or adaptable unit will be given first preference for such units regardless of what pool they are in based on the requested bedroom size. Where a person with a disability is awaiting such an accessible unit and a unit with adaptive features becomes available, the owner/management agent must offer to adapt the unit.

Are there units available for Local Preferences?

Yes, the initial occupancies of 3 units are for households who meet at least one of the Local Preference Criteria as stated in the application.

Are there Group 1 or Group 2 units?

All units are Group 1 units. The units can be adapted to satisfy a reasonable accommodation request. There is no elevator in the buildings. The 2-bedroom apartment at 275 Broadway can be converted into a Group 2 unit. Persons with disabilities are entitled to request a reasonable accommodation in rules, policies, practices, or services, or to request a reasonable modification in the housing, when such accommodations or modifications may be necessary to afford persons with disabilities an equal opportunity to use and enjoy the housing. The request for a reasonable accommodation must be made at time of initial lottery application with the required documentation, i.e. letter from doctor.

Are there preferences for Household Size?

Preference for the two bedrooms will be for households requiring two bedrooms.

Household Size Preferences are based on the following:

- There is at least one occupant per bedroom.
- A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom. Other household members may share but shall not be required to share a bedroom.
- A person described in the first sentence of (2) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
- A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.



Are there considerations for minorities?

Yes, if the percentage of minority applicants in the Local Preference Pool is less than the percentage of minorities in the Surrounding HUD-defined area, currently 33.4%, a preliminary lottery will be held comprised of all the minority applicants who do not qualify for the Local Preference Pool. Minority applicants not otherwise qualifying for the Local Preference Pool would be drawn at random from the Open Pool until the percentage of minorities in the Local Pool is no longer below the percentage of minorities in the surrounding HUD-defined area. Applicants not selected for the Local Preference Pool would be in the Open Pool only.

What happens if my household income exceeds the income limit?

Annually you will be recertified for eligibility. Once your household income exceeds 140% of the maximum allowable income adjusted for household size, then after the end of your current lease you will have the option of staying in your unit and paying the market rent or not renewing your lease.

Lottery Process

Due to the nature of the affordable units' availability, it is important for everyone to understand the procedure. Please understand the allowable income guidelines are adjusted based upon your household size. Also be advised that the program and its requirements are subject to changes in state or federal regulations.

Lottery Pools

Five affordable units are available by lottery at Residences at the Masonic Lodge in Methuen through the Open pool:

| Unit Size | # of Units | Local Pool | Open Pool |
|-------------|------------|------------|-----------|
| One Bedroom | 4 | 2 | 2 |
| Two Bedroom | 1 | 1 | 0 |

All applicants will be pulled at the time of the lottery. This will establish the rankings for the distribution of units. This means if you meet the Household Size Preference (see Page 4) for a two- bedroom unit and are drawn first in the lottery you will be offered a two- bedroom unit. This process is identical for both the Local Preference Pool and Open Pool and will be used until all units are leased or until the lottery list is exhausted. Local Pool applicants will select units first and then the Open Pool.

Please note: Household size preference will override local preference. This means if we exhaust the applicants in the local pool that require one or two-bedroom units we will move to the open pool for households requiring one or two bedrooms. Household size shall not exceed, nor may the maximum allowable household size be more restrictive than, State Sanitary Code requirements for occupancy of a unit (See 105 CMR 400). Applicants will not be approved for units larger than their household size allows.

Once the lottery rankings have been determined your information will be forwarded to the Leasing Office for credit and background checks. If the Leasing Office determines you are eligible, then you will be offered a unit. At lease signing you will be required to pay the first month's rent and security deposit.

You need to be determined eligible by MCO Housing Services, the Leasing Office and if you have a Section 8 or other housing voucher, your Public Housing Authority (PHA). If the PHA determines you or the project do not meet the eligibility criteria, then you will not be able to lease a unit.

If there are lottery applicants remaining once the affordable units are leased then they, based on the order in which such applicants were drawn from the Open Pool and subject to any applicable preferences for accessible units and household size, MCO Housing Services will establish a waiting list for future vacancies. Local preference will not be applied beyond the initial marketing and lease up.



If you are selected and have the opportunity to lease a unit you will speak or meet with a representative to review your application to verify all information. Please be advised that the official income verification will be done at the time you have an opportunity to lease. Also understand you need to be income and asset eligible but will also, at minimum, be subject to a credit screening, landlord screening, employment verification, criminal background and CORI checks by the project and determined eligible or ineligible on that basis to the extent consistent with DHCD guidance in effect at the time of such determination.

Acceptance of Units

The initial lottery “winners” may have a choice of the appropriately sized available affordable units. Post lottery each applicant will need to meet with the Leasing Office and complete their screening by the deadline provided. If you miss the deadline, we will move to the next applicant waiting for a unit and you may lose the opportunity to lease.

Summary

We hope this helps explain the process by which the units will be distributed. It can be a lengthy and sometimes complicated process. We greatly appreciate your participation and wish you the best of luck in the lottery process.

Unit Numbers

| Unit # | Building | Bedroom Size | Sq. ft. |
|---------------|-----------------|---------------------|----------------|
| 203 | 275 Broadway | 1 | 650 |
| 205(H) | 275 Broadway | 2 | 1,010 |
| 302 | 275 Broadway | 1 | 705 |
| 401 | 275 Broadway | 1 | 610 |
| 203 | 5 Pleasant St | 1 | 717 |

Building Amenities

Fitness Room



BASEMENT FLOOR PLAN
SCALE: 1/8" = 1'-0"



FLOOR AREA TABLE

| BASEMENT | 1ST FLOOR | 2ND FLOOR | 3RD FLOOR | TOTAL |
|--|---------------|---------------|---------------|----------------|
| RESIDENTIAL | 4,314 SQ. FT. | 4,314 SQ. FT. | 4,314 SQ. FT. | 12,942 SQ. FT. |
| COMMON AREAS | 1,215 SQ. FT. | 1,181 SQ. FT. | 1,111 SQ. FT. | 3,507 SQ. FT. |
| * FLOOR AREA AND APPROXIMATE DIMENSIONAL SPACE DOES NOT INCLUDE COMMON AREAS | | | | |

FOUNDING FOOTING

| NO. | DESCRIPTION | LENGTH | WIDTH | DEPTH | VOLUME | CONCRETE | REINFORCEMENT |
|-----|-------------|--------|-------|-------|--------|----------|---------------|
| 1 | ... | ... | ... | ... | ... | ... | ... |
| 2 | ... | ... | ... | ... | ... | ... | ... |
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REVISION & RESOLVE NOTES

| NO. | DATE | NOTES |
|-----|------|-------|
| | | |
| | | |
| | | |
| | | |

ADDITIONS/ALTERATIONS TO:

JOHN HANCOCK LODGE

275 BROADWAY, METHUEN, MA

SCOTT & BROWN
ARCHITECTS
1000 WASHINGTON STREET
METHUEN, MA 01844
TEL: 978.686.1000
WWW.SCOTTANDBROWN.COM

Project # 2020-09
Project Manager M.L.
Scale AS NOTED

A1.0

BASEMENT FLOOR PLAN

Issue 04/21



| FLOOR AREA TABLE | BASEMENT | 1ST FLOOR | 2ND FLOOR | 3RD FLOOR | TOTAL |
|------------------|---------------|---------------|---------------|---------------|----------------|
| COMMON AREAS | 4,192 SQ. FT. | 4,481 SQ. FT. | 4,133 SQ. FT. | 4,118 SQ. FT. | 16,924 SQ. FT. |
| RESIDENTIAL | 1,192 SQ. FT. | 1,192 SQ. FT. | 1,192 SQ. FT. | 1,192 SQ. FT. | 4,768 SQ. FT. |
| COMMON WARE | 2,812 SQ. FT. | 2,812 SQ. FT. | 2,113 SQ. FT. | 4,118 SQ. FT. | 11,755 SQ. FT. |

*FLOOR AREAS ARE APPROXIMATE NON-RESIDENTIAL SPACE DOES NOT INCLUDE COMMON AREAS

| SQUARE FOOTAGE | | | | |
|----------------|-------------|--------------------|-------------|--------------|
| FLOOR | UNIT NUMBER | RESIDENTIAL SQUARE | COMMON AREA | TOTAL SQUARE |
| BASEMENT | 001 | 1,192 | 1,620 | 2,812 |
| | 002 | 1,192 | 1,620 | 2,812 |
| | 003 | 1,192 | 1,620 | 2,812 |
| 1ST FLOOR | 101 | 1,192 | 1,620 | 2,812 |
| | 102 | 1,192 | 1,620 | 2,812 |
| | 103 | 1,192 | 1,620 | 2,812 |
| 2ND FLOOR | 201 | 1,192 | 1,620 | 2,812 |
| | 202 | 1,192 | 1,620 | 2,812 |
| | 203 | 1,192 | 1,620 | 2,812 |
| 3RD FLOOR | 301 | 1,192 | 1,620 | 2,812 |
| | 302 | 1,192 | 1,620 | 2,812 |
| | 303 | 1,192 | 1,620 | 2,812 |



SCOTT & BROWN
ARCHITECTS

100 MARKET STREET
WILMINGTON, MA 01890
TEL: 617.251.1111
WWW.SCOTTANDBROWN.COM

ADDITIONS/ALTERATIONS TO:
JOHN HANCOCK LODGE
275 BROADWAY, METHUEN, MA

REVISIONS & RESUBMITTALS

| NO. | DATE | DESCRIPTION |
|-----|------|-------------|
| | | |
| | | |
| | | |
| | | |
| | | |
| | | |
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| | | |
|-----------|-----------------|---------|
| PROJECT # | PROJECT MANAGER | DATE |
| 2020-09 | M.L. | 9/23/20 |

Scale: AS NOTED

FIRST FLOOR PLAN

A1.1

(continued on next drawing)



PLEASE READ THE FOLLOWING CAREFULLY

- 1. More than 50% of applications submitted to MCO Housing Services for lotteries are incomplete and not included in lotteries. Please take the time to read the application and submit all required documentation. It is your responsibility to provide the correct documentation. It does not matter if you were the first application or the last application received, we will NOT review applications until AFTER the posted deadline.**
- 2. Read the NOTES on the Required Personal Identification and Income Verification Documents. Failure to do so could mean the difference between a complete and incomplete application as well as eligibility for a unit.**
- 3. All financial documentation is required from all household adults aged 18 or older. No exceptions.**
- 4. DO NOT ASSUME you do not need to provide a certain document. When in question call or email BEFORE you submit your application.**
- 5. Do NOT forget to include statements from Robinhood or any other online investment accounts. They are considered part of your assets. If you have an open account, you must provide statement whether there are any funds in the account or not.**
- 6. If you are unable to provide specific information, then submit a note with your application explaining the circumstances. This will not guarantee your application will be included in the lottery, but depending on the circumstances, we may be able to work with you.**
- 7. Do not take photos with your cellphone of any documentation and email it to us. The photos are not legible, and we will not accept them.**
- 8. You can fax your information, but it is not recommended. If all pages are not received your application would be considered incomplete.**



RESIDENCES AT THE MASONIC LODGE

LOTTERY APPLICATION

For Office Use Only:

Date Appl. Rcvd: _____

Household Size: _____

Local: Y / N

Lottery Code: _____

Application Deadline: January 17, 2023

PERSONAL INFORMATION:

Date: _____

Name: _____

Address: _____ Town: _____ Zip: _____

Home Telephone: _____ Work Telephone: _____ Cell: _____

Email: _____

Have you ever owned a home? _____ If so, when did you sell it? _____

LOCAL PREFERENCE: (Check all that apply) Proof of Local Preference will be required if you have the opportunity to lease.

- Current Methuen Resident
- Currently employed by the Town of Methuen or the Methuen School Department
- Employees of businesses located in Methuen or with a bonafide offer of employment from a business located in Methuen
- Household with children attending the Methuen School System

Do you have a Section 8 or other housing voucher (the units are **NOT** subsidized or income based): _____ Yes _____ No

Bedroom Size: _____ One Bedroom _____ Two Bedroom

Do you require a wheelchair accessible unit? _____ Yes _____ No

Do you require any adaptations or special accommodations? _____ Yes _____ No

If Yes, Please explain: _____

The total household size is _____

Household Composition - complete for everyone that will be living in the unit.

Name _____ Relationship _____ Age _____

Name _____ Relationship _____ Age _____

Name _____ Relationship _____ Age _____

Name _____ Relationship _____ Age _____



FINANCIAL WORKSHEET: (Include all Household Income, which includes gross wages, retirement income (if drawing on it for income), business income, veterans' benefits, alimony/child support, unemployment compensation, social security, pension/disability income, supplemental second income and dividend income.)

Applicants Monthly Base Income (Gross) _____
 Other Income, specify _____
 Co-Applicants Monthly Base Income (Gross) _____
 Other Income, specify _____

TOTAL MONTHLY INCOME: _____

Household Assets: (This is a partial list of required assets. Complete all that apply with current account balances)

Checking (avg balance for 3 months) _____
 Savings _____
 Debit Card _____
 Stocks, Bonds, Treasury Bills, CD or
 Money Market Accounts and Mutual Funds _____
 Individual Retirement, 401K and Keogh accounts _____
 Retirement or Pension Funds (amt you can w/d w/o penalty) _____
 Revocable trusts _____
 Equity in rental property or other capital investments _____
 Cash value of whole life or universal life insurance policies _____

TOTAL ASSETS _____

EMPLOYMENT STATUS: (include for all working household members. Attach separate sheet, if necessary.)

Employer: _____
 Street Address: _____
 City/State/Zip: _____
 Date of Hire (Approximate): _____
 Annual Wage - Base: _____
 Additional: _____ (Bonus, Commission, Overtime, etc.)

ABOUT YOUR HOUSEHOLD: (OPTIONAL)

You are requested to fill out the following section in order to assist us in fulfilling affirmative action requirements. Please be advised that you should fill this out based upon family members that will be living in the apartment/unit. Please check the appropriate categories:

| | Applicant | Co-Applicant | (#) of Dependents |
|-------------------------------------|-----------|--------------|-------------------|
| Black or African American | _____ | _____ | _____ |
| Hispanic or Latino | _____ | _____ | _____ |
| Asian | _____ | _____ | _____ |
| Native American or Alaskan Native | _____ | _____ | _____ |
| Native Hawaiian or Pacific Islander | _____ | _____ | _____ |
| Not White | _____ | _____ | _____ |

SIGNATURES:

The undersigned warrants and represents that all statements herein are true. It is understood that the sole use of this application is to establish the preliminary requirements for placement into a lottery to have an opportunity to lease an



affordable unit at Residences at the Masonic Lodge. I (we) understand if selected all information provided shall be verified for accuracy at the time of lease.

Signature _____

Applicant(s)

Date: _____

Signature _____

Co-Applicant(s)

Date: _____

See page 22 for submission information



Residences at the Masonic Lodge

Affidavit & Disclosure Form

I/We understand and agree to the following conditions and guidelines regarding the distribution of the affordable units at Residences at the Masonic Lodge in Methuen, MA through the Mass Department of Housing and Community Development:

1. The gross annual household income for my family does not exceed the allowable limits as follows:

| Household Size | 1 | 2 | 3 | 4 |
|----------------------------|----------|----------|----------|----------|
| Max Gross Allowable Income | \$62,600 | \$71,550 | \$80,850 | \$89,400 |

Income from all family members must be included.

2. I/We understand the calculation of income will include the higher of actual income from assets (if over \$5,000) or an imputation of .06% of the value of total household assets which is added to a household's income in determining eligibility.

3. The household size listed on the application form includes only and all the people that will be living in the residence.

4. I/We certify all data supplied on the application is true and accurate to the best of my/our knowledge and belief under full penalty of perjury. I/We understand that providing false information will result in disqualification from further consideration.

5. I/We understand that by being selected in the lottery does not guarantee that I/we will be able to lease a unit. I/We understand that all application data will be verified and additional financial information may be required, verified and reviewed in detail prior to leasing a unit. I/We also understand that the Project's Owner will also perform its own screening to determine our eligibility to lease.

6. I/We understand that if selected I/we will be offered a specific unit. I/We will have the option to accept the available unit, or to reject the available unit. If I/we reject the available unit I/we will move to the bottom of the waiting list and will likely not have another opportunity to lease an affordable unit at Residences at the Masonic Lodge.

7. Program requirements are established by DHCD and are enforced by the Project's Monitoring Agent and, as necessary, DHCD. I/We agree to be bound by whatever program changes may be imposed at any time throughout the process. If any program conflicts arise, I/we agree that any determination made by the Monitoring Agent or, as necessary, DHCD is final.

8. Affordable units may not be leased to individuals who have a financial interest* in the development or to a Related Party,** or to their families. I/we certify that no member of our household has a financial interest in this Project, is a Related Party, or is a family member of someone who has a financial interest or is a Related Party.

***"Financial interest"** means anything that has a monetary value, the amount of which is or will be determined by the outcome of the Project, including but not limited to ownership and equity interests in the Developer or in the subject real estate, and contingent or percentage fee arrangements; but shall not include third party vendors and contractors.

****Related Party means:**

1. any person that, directly or indirectly, through one or more intermediaries, controls or is controlled by or is under common control with the Developer, as well as any spouse of such person or "significant other" cohabiting with such person, and any parent, grandparent, sibling, child or grandchild (natural, step, half or in-law) of such person;
2. any person that is an officer of, member in, or trustee of, or serves in a similar capacity with respect to the Developer or of which the Developer is an officer, member, or trustee, or with respect to which the Developer



serves in a similar capacity, as well as any spouse of such person or “significant other” cohabiting with such person, and any parent, grandparent, sibling, child or grandchild (natural, step, half or in-law) of such person;

3. any person that, directly or indirectly, is the beneficial owner of, or controls, 10% or more of any class of equity securities of, or otherwise has a substantial beneficial interest (10% or more) in, the Developer, or of which the Developer is directly or indirectly the owner of 10% or more of any class of equity securities, or in which the Developer has a substantial beneficial interest (10% or more) , as well as any spouse of such person or “significant other” cohabiting with such person, and any parent, grandparent, sibling, child or grandchild (natural, step, half or in-law) of such person;

4. any employee of the Developer; and

5. any spouse, parent, grandparent, sibling, child or grandchild (natural, step, half or inlaw) of an employee of the Developer or “significant other” cohabiting with an employee of the Developer.

9. I/We understand there may be differences between the market and affordable units and accept those differences.

10. I/We understand if my/our total income exceeds 140% of the maximum allowable income at the time of annual eligibility determination, after the end of my then current lease term I will no longer be eligible for the affordable rent.

I/We have completed an application and have reviewed and understand the process that will be utilized to distribute the available units at Residences at the Masonic Lodge. I/We am qualified based upon the program guidelines and agree to comply with applicable regulations.

Applicant

Co-Applicant

Date

See page 22 for submission information



**Required Personal Identification and Income Verification Documents
TO BE RETURNED WITH APPLICATION**

Provide of all applicable information. Complete financial documentation is required and must be sent with your application to participate in the lottery. Incomplete applications will not be included in the lottery and the applicant will be notified after the application deadline.

Initial each that are applicable, and provide the documents, or write N/A if not applicable and return this sheet with your application.

1. _____ If you have a Section 8 Voucher or other Housing Voucher, you MUST provide a valid copy with your application.
2. _____ One form of identification for all household members, i.e. birth certificates, driver's license, etc.
3. _____ If you require a Special Accommodation you must request as part of your application and if documentation is required, i.e. doctors letter, it MUST be included with the application.
4. _____ The most recent last five (5) **consecutive** pay stubs for all jobs (check/direct deposit stubs). For unemployment, copies of unemployment checks or DOR verification stating benefits received. Same for disability compensation, worker's compensation and/or severance pay.
 - **NOTE:** If you have obtained a new job within the last 12 months you must provide a copy of the Employment Offer Letter.
 - **NOTE:** If you are no longer working for an employer you worked for in the past 12 months, you must provide a letter from the employer with your separation date.
 - **NOTE:** You need to provide 5 pay stubs whether you are paid weekly, bi-weekly or monthly.
5. _____ Benefit letter providing full amount of periodic amounts received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
6. _____ Child support and alimony: court document indicating the payment amount, DOR statement. If you do not receive child support provide a letter stating, that you are not receiving child support. See attached form.
7. _____ If you are self-employed you MUST provide a detailed Profit and Loss statement for the last 12 months and three months of business checking and savings accounts along with last three Federal Income Tax Returns. Uber, Lyft, Grubhub, etc. are considered self employment.
8. _____ Federal Tax Returns –2021 tax return (NO STATE TAX RETURNS)
 - **NOTE:** Provide all pages that are submitted to the IRS. For example, if a Schedule C is submitted to the IRS and not part of your application, your application will be considered incomplete.
 - **NOTE:** If you did not submit a tax return for the 2020 then you must provide a Verification letter of non-filing from the IRS. The form to request is 4506-T and can be found on [irs.gov](https://www.irs.gov).



- **NOTE:** If you filed your taxes and are unable to locate you can request the transcript of your Federal taxes by submitting form 4506-T to the IRS. The form can be found on [irs.gov](https://www.irs.gov).

9. _____ W2 and/or 1099-R Forms: 2021

10. _____ Interest, dividends and other net income of any kind from real or personal property.

11. Asset Statement(s): provide **current** statements of all that apply, unless otherwise noted:

- _____ Checking accounts – Last **three (3)** months of statements – EVERY PAGE – FRONT AND BACK.

NOTE: If you have cash deposits or non payroll or income deposits you MUST identify where the funds have come from. If you fail to explain they will be counted as income, which may put you over the income limit.

NOTE: Do NOT provide a running transaction list of activity. You must provide the individual statements.

- _____ Pre-paid debit card statements – current month.

NOTE: This is **NOT** your ATM/Debit card. This is usually a separate debit card statement showing income deposited directly onto the debit card, i.e. Social Security or other regular income.

NOTE: If Social Security payments are deposited on a Direct Express card it is your responsibility to provide proof. You can print a statement from the Direct Express website at

<https://www.usdirectexpress.com/>.

- _____ Saving accounts – last three months of full statements
- _____ Revocable trusts
- _____ Equity in rental property or other capital investments
- _____ Investment accounts, including stocks, bonds, Treasury Bills, Certificates of Deposit, Mutual Funds, Money Market, Robinhood and all online accounts, etc.
- _____ Retirement accounts, IRS, Roth IRS, 401K, 403B, etc for all current and past jobs
- _____ Cash value of Whole Life or Universal Life Insurance Policy.
- _____ Personal Property held as an investment
- _____ Lump-sum receipts or one-time receipts

12. _____ Proof of student status for dependent household members over age of 18 and full-time students. Letter from High School or College providing student status, full time or part time for current or next semester.

13. _____ A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application, i.e. letter from doctor.

14. _____ If the applicant is in the process of a divorce or separation, the applicant must provide legal documentation the divorce or separation has begun or has been finalized. Information must be provided regarding the distribution of family assets.



We understand if we do not provide all applicable financial documentation we will not be included in the lottery. We also understand that in such an event we will be notified after the application deadline that our application is incomplete.

Print Applicants Name(s): _____

Applicants Signature

DATE

Co-Applicants Signature

DATE

See page 22 for submission information



Residences at the Masonic Lodge
Methuen, MA

Release of Information Authorization Form

Date: _____

I/We hereby authorize MCO Housing Services, Residences at the Masonic Lodge Leasing Office, Residences at the Masonic Lodge, LLC, or any of its assignees to verify any and all income, assets and other financial information, to verify any and all household, resident location and workplace information and directs any employer, landlord or financial institution to release any information to MCO Housing Services, Residences at the Masonic Lodge Leasing Office, Residences at the Masonic Lodge, LLC, or any of its assignees and consequently the Projects Administrator, for the purpose of determining income eligibility for Residences at the Masonic Lodge.

A photocopy of this authorization with my signature may be deemed to be used as a duplicate original.

Applicant Name (Please Print)

Applicant Name (Please Print)

Applicant Signature

Applicant Signature

Mailing Address



Return the following to MCO Housing Services:

1. Completed, signed and dated application.
2. Signed and dated Affidavit and Disclosure Form
3. Completed, signed and dated Required Personal Identification and Income Verification Documents Form
4. All required financial documentation.
5. Complete, signed and dated *Release of Information Authorization Form*

RETURN ALL, postmarked on or before the January 17, 2023 application deadline to:

MCO Housing Services, LLC
P.O. Box 372
Harvard, MA 01451
Overnight mailing address: 206 Ayer Road, Harvard, MA 01451
Phone: 978-456-8388
FAX: 978-456-8986
Email: lotteryinfo@mcohousingservices.com
TTY: 711, when asked 978-456-8388

NOTE: If you are mailing your application close to the application deadline, make sure you go into the Post Office and have them date stamp and mail. As I understand, mail that is sent to the central sorting facility use bar codes so we would have no idea when the application was mailed and it can take longer for MCO to receive. If we receive an application after the deadline that has a barcode it will be counted as a late application and will not be included in the lottery.

