



# THE NEEL MANAGEMENT TEAM, INC.



TDD 1-800-735-2900

## STEVENS PLACE TENANT SELECTION CRITERIA

### 1. Application/Eligibility:

The Neel Management Team, Inc. manages this apartment complex. The policy of The Neel Management Team, Inc. is one of equal housing opportunity for prospective applicants regardless of race, color, religion, sex, handicap, familial status or national origin. All persons interested in an apartment must complete and submit an application to be considered for tenancy.

This property is financed with funding from the Low Income Housing Tax Credits Agency and HOME. It is a 50 unit Family complex. The criteria has been developed for Stevens Place Apartments and may be changed at any time without notice to any party other than the Management Agent. To be eligible for admission, applicants cannot have an annual gross income that exceeds 50% of the area median income. The applicant's net income must be at least two (2) times the rent level. Food stamps will be included in meeting the income requirement. Households consisting entirely of full time students are considered ineligible. A student is defined as an individual who attends school full-time (as defined by the institution being attended) for five (5) or more months in the upcoming twelve (12) months (commencing from the move-in date). Full-time students who work full-time are still considered students. Some exceptions do apply. You may ask for further clarification. We require that any prospective tenant must demonstrate the ability to pay monthly utilities and other expenses imperative for the survival of the household.

Eligibility for the unit size is based on LIHTC and HOME regulations. There are 1, 2, 3 and 4 bedroom units in this apartment complex. Occupancy guidelines are as follows:

<u>Bedroom Size</u>	<u>Minimum Occupants</u>	<u>Maximum Occupants</u>
1	1 person	3 persons
2	2 persons	5 persons
3	3 persons	7 persons
4	4 persons	9 persons

Monthly unit rents are as shown below:

	<b>30 %</b>	<b>40%</b>	<b>50%</b>	<b>50% HOME</b>
<b>1 BR</b>	\$199	\$274	\$349	\$348
<b>2 BR</b>	\$236	\$324	\$411	\$411
<b>3 BR</b>	\$264	\$366	\$466	\$466
<b>4 BR</b>	N/A	N/A	\$515	\$515

## **2. Waiting List/Priorities:**

All applicants will be notified of the acceptance or rejection of their application. All applications are placed on a master waiting list by date and time received. Those determined ineligible due to income or occupancy status will be notified of the reason for their rejection, and their name removed from the waiting list.

Applicants eligible by LIHTC and HOME income and occupancy regulations are listed on the waiting list and categorized by bedroom size, date of application and need for handicap accessible units. Applicants will be selected chronological from the waiting list, taking into account certain set-asides for households meeting the project's special needs requirements.

All applicants may inquire as to their chronological place on the waiting list. All LIHTC and HOME priorities in regard to waiting lists and tenant selection, in addition to eligibility regulations for income and occupancy, will be explained to all applicants.

For applications to be accepted, applicants must complete the application in full (including income and asset documentation) and supply references that can be checked. Since the management staff is available to answer any questions an applicant may have in regard to filling out the application form, incomplete applications will be returned to applicants.

## **3. Selection/Rejection:**

Applicants who meet the income/occupancy guidelines and have come to the top of the LIHTC and HOME income and other priority lists still must meet all other eligibility criteria before being approved to move in. The Management will notify the applicant when their application is ready to be processed for residency. At this time, the applicant must come in for an interview and supply the management with current income and asset documentation.

Trans-Union Credit will do credit checks. Pacific Screening, Inc. will do criminal and public record checks. The management will house no applicant without an interview and credit, criminal and reference check. Should an applicant fail to come to two scheduled interviews, the application will be removed.

Some applicants may have no previous or current rental or credit references, but can still offer personal non-related references. Tenants whose rental, personal or credit references prove negative may be rejected based solely on those negative references. Rejection may also occur if the current living circumstances are unsanitary or the unit is damaged due to applicant abuse or neglect, if the applicant has a previous history of evictions, non-payment of rent or other financial obligations, if there has been a violation of a previous rental agreement such as a history of disturbing the quiet enjoyment of neighbors, violence, harassment, or other criminal history. Applicants will also be rejected if found to be a direct threat to the health and safety of others, to have been convicted of dealing drugs, or if currently addicted to an illegal or controlled substance. The applicant will have 14 days after he has received the rejection letter to file a response. The management will have 5 days to answer the applicant's response. Applicants will not be rejected solely on the basis of race, color, religion, sex, handicap, familial status or national origin.

Handicap accessible units will be marketed to qualified handicap/disabled households who would benefit from the unit features. We will consider any request for reasonable accommodation, including alterations to non-accessible units. We will reply in writing to such requests. In the event no households apply who need the special unit features, LIHTC and HOME will be contacted for permission to house other households in these units. In this circumstance, tenants will sign a lease addendum agreeing to transfer (at their expense) to another unit later on should an appropriate unit become available and there are households needing the benefit of the handicap accessible unit now on the waiting list.

All tenants must be legally capable of entering into a lease agreement.

Should an applicant be selected and refuse occupancy for reasons other than a medical emergency, that applicant's name will be removed from the waiting list. That applicant may reapply and will be placed on the waiting list by the new date of application. The applicant must check in with the agent/site manager at least once every six months if he/she wishes to remain on the waiting list. Failure to do so will result in automatic removal from the waiting list.

If the apartment complex has a waiting list of approximately one year the management will close the list until it becomes shorter.

All accepted tenants must pay rent as determined on the Tenant Certification Form, and sign that form along with the apartment complex's LIHTC and/or HOME approved lease and attachments.

This tenant selection criteria is an attachment to the Management Plan and shall be revised should LIHTC or HOME regulations or management policies change.

## INCOME LIMITS FOR STEVENS PLACE

	<b>1 PER</b>	<b>2 PER</b>	<b>3 PER</b>	<b>4 PER</b>	<b>5 PER</b>	<b>6 PER</b>	<b>7 PER</b>
<b>30%</b>	\$11,100	\$12,700	\$14,250	\$15,850	\$17,100	\$18,400	\$19,650
<b>40%</b>	\$14,800	\$16,920	\$19,040	\$21,160	\$22,840	\$24,560	\$26,240
<b>50%</b>	\$18,500	\$21,150	\$23,800	\$26,450	\$28,550	\$30,700	\$32,800

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Site Manager/Agent  
The Neel Management Team, Inc.

Project Name: Stevens Place Apartments  
Address: 1105 Stevens Place  
Medford, OR 97504  
(541) 857-0616



# Stevens Place Apts.

Project Locations: 1105 Stevens Street Medford OR. 97504

## TENANT APPLICATION FORM

To be filled out in full by all prospective tenants and returned to the Manager of Stevens Place Apts. with Income, Employment, Assets, and Asset Income documents. \$16.00 fee due when application is processed for residency.

Applicant \_\_\_\_\_ Sex \_\_\_ Age \_\_\_ Date of Birth \_\_\_\_\_ SS# \_\_\_\_\_ ODL# \_\_\_\_\_

Co-Applicant \_\_\_\_\_ Sex \_\_\_ Age \_\_\_ Date of Birth \_\_\_\_\_ SS# \_\_\_\_\_ ODL# \_\_\_\_\_

Present Address \_\_\_\_\_ State \_\_\_ Zip \_\_\_\_\_ Phone \_\_\_\_\_

Would anyone in your household benefit from a handicap accessible unit? \_\_\_ If yes, specify type of unit required \_\_\_\_\_

Size of unit desired (1, 2, 3 or 4 Bedroom) \_\_\_\_\_ (One person household doesn't qualify for a 2 bedroom Unit.)

Will you take smaller unit than desired if vacancy exists? \_\_\_\_\_ Will you accept an upstairs unit if vacancy exists? \_\_\_\_\_

HOUSEHOLD MEMBERS (List **all** members of Household - Applicant, Co-Applicant, Minor Children etc.)

Full Name	Sex	Relationship	Date of Birth	Social Security	Occupation

### EMPLOYMENT STATUS:

APPLICANT: Employer \_\_\_\_\_ Address \_\_\_\_\_  
Phone \_\_\_\_\_ Length of Employment \_\_\_\_\_ Retired \_\_\_\_\_

CO-APPLICANT: Employer \_\_\_\_\_ Address \_\_\_\_\_  
Phone \_\_\_\_\_ Length of Employment \_\_\_\_\_ Retired \_\_\_\_\_

### BANKING:

Checking Account Bank Name \_\_\_\_\_ Account # \_\_\_\_\_  
Savings Account Bank Name \_\_\_\_\_ Account # \_\_\_\_\_  
Savings Account Bank Name \_\_\_\_\_ Account # \_\_\_\_\_  
Bonds/Certificates Bank Name \_\_\_\_\_ Account # \_\_\_\_\_  
Life Insurance Policy #- \_\_\_\_\_ Cash Value \$ \_\_\_\_\_

### GIVE TWO RENTAL REFERENCES:

Present Landlord \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_  
Length of Residency \_\_\_\_\_ Reason for Moving \_\_\_\_\_ Rent \_\_\_\_\_  
Previous Landlord \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_  
Length of Residency \_\_\_\_\_ Reason for Moving \_\_\_\_\_ Rent \_\_\_\_\_

### PERSONAL REFERENCES : (Two persons not related or living with you, whom you have known at least 1 year)

1. Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_  
2. Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

### NEAREST RELATIVE: (for emergency contact)

Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

### GIVE TWO CREDIT REFERENCES :

1. Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_  
2. Name \_\_\_\_\_ Address \_\_\_\_\_ Phone \_\_\_\_\_

Where did you hear about these Apts? : Newspaper Ad \_\_\_ Phone book Ad \_\_\_ Posted notice \_\_\_ Friend \_\_\_ Other \_\_\_

**Stevens Place Apts. Rental Application Form**

INCOME INFORMATION

Part I

ANNUAL INCOME

- Employment - Applicant (GROSS - BEFORE DEDUCTIONS)
- Employment - Co-Applicant (GROSS - BEFORE DEDUCTIONS)
- Social Security ANNUALLY - Applicant (include Medicare)
- Social Security ANNUALLY - Co-Applicant (include Medicare)
- Retirement Pensions (ANNUAL)
- Disability Income (ANNUAL)
- Employment (GROSS - BEFORE DEDUCTIONS)
- Other Income (Gifts given regularly, etc.)
- Student Income (loan or other income)

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\_\_\_\_\_

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ASSET INFORMATION

Part II

ANNUAL INCOME

ASSET NET WORTH

(For Annual Income - give amount of income from interest, principal payments etc. Asset Net Worth - give balance or value at this time.)

- Property (Contracts or Property you are holding)
- Savings Account (s)
- Time Certificates, Treasury Bills, Money Market etc.
- Individual Retirement & Keogh Accounts
- Checking Account (Average balance last 12 months)
- Other (Identify)
- Other (Identify)
- TOTALS (Total of all items in I and II)

\_\_\_\_\_

\_\_\_\_\_

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OTHER ASSET INFORMATION

POLICY # (If Applicable)

CASH VALUE

MATURITY DATE

- Savings Bonds
- Stocks or Bonds
- Life Insurance
- Burial Fund
- Annuity
- Food Stamps

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Previously Disposed of Assets - Have you sold/dispensed of any property/assets in the last 2 years \_\_\_\_\_. If yes, type of property/assets \_\_\_\_\_ Date sold/dispensed of \_\_\_\_\_ Amount received from asset \$ \_\_\_\_\_  
 Have you given any asset or property away in the past 2 years? \_\_\_\_\_ If yes, give fair market value at disposal \$ \_\_\_\_\_

DEBT INFORMATION

CREDIT SOURCE Company Name & Address	Account Number	Current Balance	Minimum Monthly Pmt	Current on Pmts (Y or N)

Is anyone in the household a full-time student \_\_\_\_\_  
*Note: To be considered a student, she/he must carry a subject load considered full-time by the educational institution attended.*

AUTOMOBILES:

Make/Model \_\_\_\_\_ Color \_\_\_\_\_ Year \_\_\_\_\_ Lic # \_\_\_\_\_ State \_\_\_\_\_  
 Make/Model \_\_\_\_\_ Color \_\_\_\_\_ Year \_\_\_\_\_ Lic # \_\_\_\_\_ State \_\_\_\_\_

**Stevens Place Apts. Rental Application Form**

1. Do you have any pets? \_\_\_\_\_ If yes, specify type \_\_\_\_\_
  2. Do you have a waterbed? \_\_\_\_\_ If yes, do you have waterbed insurance \_\_\_\_\_ Policy Holder & # \_\_\_\_\_
  3. Are you or a member of your household a current illegal user/distributor of a controlled substance? \_\_\_\_\_ Yes \_\_\_\_\_ No
  4. Have you or a member of your household been convicted of the illegal use of a controlled substance? \_\_\_\_\_ Yes \_\_\_\_\_ No
  5. Have you or a member of your household ever been convicted of the illegal manufacture or distribution of a controlled substance? \_\_\_\_\_ Yes \_\_\_\_\_ No
  6. If you answered yes to question 3,4 or 5 above, has the person successfully completed a controlled substance abuse recovery program or is the person presently enrolled in such a program? \_\_\_\_\_ Yes \_\_\_\_\_ No
  7. Have you or any member of your household been convicted of a felony? \_\_\_\_\_ Yes \_\_\_\_\_ No
  8. Have you or any member of your household ever been evicted? \_\_\_\_\_ Yes \_\_\_\_\_ No. If Yes give reason \_\_\_\_\_
- 
9. Have you or any member of your household have a history of violence of any kind? \_\_\_\_\_ Yes \_\_\_\_\_ No  
If Yes, please specify \_\_\_\_\_

I/We hereby certify that this apartment will be my/our permanent residence and I/we will not maintain a separate rental unit in a different location.

I/We agree to give the owner/owner's representative the authority to investigate and obtain my/our credit rating, current and past rental records, employment history, any source of income to household, current/past utility records, and any information necessary to determine my/our eligibility, including criminal record. The information obtained will be used for management purposes only and will be held in confidence. My/Our signature (s) below certifies that the statements made on this application are TRUE and CORRECT, and gives management CONSENT to verify the information contained in this application. I/We understand that due to changes in circumstances additional information may be requested at a later date to complete the processing of this application.

GIVING FALSE INFORMATION ON THIS APPLICATION MAY RESULT IN EVICTION AFTER OCCUPANCY.

**WARNING: " Section 1001 of Title 18, United States Code provides, "Whoever in any matter within the jurisdiction of any department or agency of the United States knowingly and willfully falsifies, conceals or covers up by any trick, scheme, or device a material fact, or makes any false, fictitious or fraudulent statements or representations, or makes or uses any fraudulent statement or entry shall be fined not more than \$250,000 or imprisoned not more than five years, or both."**

Applicants Signature \_\_\_\_\_ Date \_\_\_\_\_

Co-Applicants Signature \_\_\_\_\_ Date \_\_\_\_\_

The information regarding race, national origin and sex designation solicited on this application is requested in order to assure the Federal Government that Federal Laws prohibiting discrimination against tenant applicants on the basis of race, color, national origin, religion, sex, marital status, age and handicap are complied with. You are not required to furnish this information but are encouraged to do so. This information will not be used in evaluating your application or to discriminate against you in any way. However, if you choose not to furnish it, the owner is required to note the race/national origin and sex of individual applicants on the basis of visual observation or surname."

Applicant : American Indian or Alaska Native \_\_\_\_\_ Asian or Pacific Islander \_\_\_\_\_  
White, Non Hispanic \_\_\_\_\_ Hispanic \_\_\_\_\_ Black, Non-Hispanic \_\_\_\_\_

Co-Applicant : American Indian or Alaska Native \_\_\_\_\_ Asian or Pacific Islander \_\_\_\_\_  
White, Non Hispanic \_\_\_\_\_ Hispanic \_\_\_\_\_ Black, Non-Hispanic \_\_\_\_\_

Household Members: American Indian or Alaska Native \_\_\_\_\_ Asian or Pacific Islander \_\_\_\_\_  
White, Non Hispanic \_\_\_\_\_ Hispanic \_\_\_\_\_ Black, Non-Hispanic \_\_\_\_\_

**OFFICIAL USE ONLY**

Date Received \_\_\_\_\_ Time of Day \_\_\_\_\_ Income Level (Enter Code ) \_\_\_\_\_

Approved for Residency \_\_\_\_\_ Date approval mailed \_\_\_\_\_

Not Approved for Residency \_\_\_\_\_ Date and reason not approved \_\_\_\_\_ Date mailed \_\_\_\_\_

**CONTACT INFORMATION:** (Give date & time of contact, response, no response)

Reason for removal from applicant list \_\_\_\_\_

(moved into Stevens Place Apts., found other housing, unable to contact four times, application not updated, deceased, etc.)

KEEP IN FILE FOR THREE (3) YEARS.