

### APPLICATION FOR ASSISTANCE

#### NOTE: DOCUMENTATION REQUIREMENTS

- Applicants must provide proof of age and income (in addition to signing the application).
- See attached instructions for more information.

#### APPLICANT INFORMATION

Name:			
Date of birth:		SSN:	Phone:
Current address:			
City:		State:	ZIP Code:
Own:	Rent:	Monthly Amount:	How long?:
Previous address:			
City:		State:	ZIP Code:
Owned:	Rented:	Monthly Amount:	How long?:

#### EMPLOYMENT INFORMATION

Current employer:			
Employer address:			How long?:
Phone:	E-mail:		Fax:
City:		State:	ZIP Code:
Position:	Hourly:	Salary:	Annual income:
Additional Income (Annual amount):			From Who?:

Name of a relative not residing with you:			
Address:			Phone:
City:		State:	ZIP Code:
Relationship:			

#### CO-APPLICANT INFORMATION, IF FOR A JOINT ACCOUNT

Name:			
Date of birth:		SSN:	Phone:
Current address:			
City:		State:	ZIP Code:
Own:	Rent:	Monthly Amount:	How long?:

#### EMPLOYMENT INFORMATION

Current employer:			
Employer address:			How long?:
Phone:	E-mail:		Fax:
City:		State:	ZIP Code:
Position:	Hourly:	Salary:	Annual income:
Name of a relative not residing with you:			
Address:			Phone:
City:		State:	ZIP Code:
Relationship:			

**BANK ACCOUNTS (CHECKING, SAVINGS, CD'S, STOCKS, BONDS, ETC...)**

Name of Financial Institutions	Account no.	Current balance	Description of Account

**CREDIT CARDS**

Name	Account no.	Current balance	Monthly payment

**MORTGAGE COMPANY**

Mortgage Holder	Address/Phone no.	Account no.	Balance

**AUTO LOANS**

Auto loans	Account no.	Balance	Monthly payment

**OTHER LOANS, DEBTS, OR OBLIGATIONS**

Description	Account no.	Amount

**OTHER ASSETS OR SOURCES OF INCOME**

Description	Amount per month or value

I authorize Hands to Help Seniors, Inc. to verify the information provided on this form as to my credit and employment history.

Signature of applicant	Applicant Date
Signature of co-applicant, if for joint account	Co-Applicant Date

- Did you Remember to:
- ✓ Sign Your Application?
  - ✓ Attach income documentation.

## **PRIVACY ACT NOTIFICATION**

The disclosure of Social Security Numbers for applicants is required in order to process the application. This number is being requested for tax administration purposes, financial status of the applicant, and will be used to facilitate the processing of reports and to establish and maintain a uniform system for identifying taxpayers for any lawful purpose. By giving us your Social Security or other personal information, you expressly authorize Hands to Help Seniors, Inc. to use this in order to verify financial information such as income, bank accounts and other assets used to determine eligibility. This number may also be disclosed as part of information contained in the taxpayer's return or to any department, person, agency or entity as may be required by law, or if the applicant gives written authorization to a third party. Failure to disclose your Social Security number will result in your application not being processed.

## **ELIGIBILITY REQUIREMENTS**

Eligibility requirements that must be met in order to receive assistance from Hands to Help Seniors, include but are not limited to:

- 65 years of age or older or legally disabled.
- Annual income of \$30,000.00 or less.
- Your annual expenditures are more than your annual income.
- The assistance requested is required to maintain a healthy and safe environment in your own home.

## **APPLICATION INSTRUCTIONS**

Section A: APPLICANT INFORMATION- Enter all information correctly.

Section B: EMPLOYMENT INFORMATION - Complete this section if you are currently employed. Also included any additional income that is not requested in Section E.

Section C: CO-APPLICANT INFORMATION, IF FOR A JOINT ACCOUNT - Complete this section if you are married, or have another person living with you and share income and expenses.

Section D: EMPLOYMENT INFORMATION – This is for the Co-Applicant.

Section E: BANK ACCOUNTS – List all bank accounts, certificate of deposits, money market accounts, stock holdings, bonds, etc. for everyone living in the house.

Section F: CREDIT CARDS – List all credit cards and there balances still owed.

Section G: MORTGAGE COMPANY - List all property's owned, address and phone number of mortgage holder, account number and current balance owed.

Section H: AUTO LOANS – List all automobiles with each of there account numbers, balance owed and monthly payment.

Section I: OTHER LOANS, DEBTS, OR OBLIGATIONS – Any other outstanding loans, debts, or obligations.

### **DOCUMENTATION REQUIREMENTS:**

**INCOME:** Provide a copy of your federal income tax return for the year prior to your application, along with all W-2s (wage & tax statements) and 1099-SSAs (social security benefit statements). If a federal tax return was not filed, attach proof of each income item in Section B. Appropriate proof of income includes W-2s, 1099-SSAs, 1099-Rs (pension & annuity retirement income), SSI letters, bank & brokerage account end of year statements and public assistance benefit letters.

**SIGNATURE:** Please sign and date the application. Without your signature, the application cannot be processed and will be returned to you. Mail completed application to:

Hands to Help Seniors, Inc.  
P.O. Box 655  
Monterey, CA 93942