

HERITAGE SQUARE—new affordable senior housing in Pasadena

Pre-applications packets must be received by mail by August 08, 2016.



Thank you for your interest in Heritage Square, a 70-unit residential apartment community. We invite seniors age 55 and older to apply, all other members must be age 45 (exceptions apply). This new non-smoking community is comprised of 69 one bedroom apartments with Project Based Section 8 subsidy and a managers unit. This quality affordable housing has been developed by BRIDGE Housing Corporation in conjunction with the City of Pasadena. Of the 70 units 4 are built out for mobility impaired households and 2 are designed for the hearing impaired households.

Heritage Square will offer onsite laundry, a community room with a full kitchen, a library and reading room, an outdoor courtyard, a fitness center, and on-site professional management. Individual apartments include all electric kitchens and dishwashers. Heritage Square is located at 750 N. Fair Oaks Avenue near Orange Grove Boulevard.

1 Bedroom Section 8 Units				1 Persons	2 Persons	3 Persons
No. of <u>Units</u>	Unit AMI	Tenant <u>Rent</u>	Min. <u>Income</u>	Max. <u>Income</u>	Max. <u>Income</u>	Max. <u>Income</u>
7	30%	30% of adjusted income	\$0	\$18,240	\$20,850	\$23,460
18	45%	30% of adjusted income	\$0	\$27,360	\$31,275	\$35,190
44	50%	30% of adjusted income	\$0	\$30,400	\$34,750	\$39,100

Demand for Heritage Square is sure to be high. All pre-application packets must be received by mail by August 08, 2016. The pre-application packets will be randomly ordered to establish the **Initial Waitlist**.

The random ordering and preference status determine the order in which pre-applications are processed. Apartments are offered on a first-qualified, first offered basis. Only one pre-application packet will be accepted per household; additional applications will be denied.

To apply, please return the completed pre-application packet signed by each adult applicant (18 and older) as soon as possible by mail to:

**Heritage Square c/o The John Stewart Company
888 South Figueroa Street, Suite 700
Los Angeles, CA 90017**



Pre-applications received by August 08, 2016 will be placed on the initial waitlist. This waitlist will be used during lease-up only. After all apartments are leased, the waitlist will be dissolved and future vacancies will be filled with referrals from the Housing Choice Voucher list from the Housing Department of the City of Pasadena.

What if I need changes in the way I communicate with you as a result of a disability?

If as a result of a disability you need changes in the way we communicate with you, please contact us by calling The John Stewart Company at (213) 787-2748.

One reason we are able to offer these apartments at affordable rents is because Heritage Square is funded by a federally regulated government program called the Low Income Housing Tax Credit Program (LIHTC). This program, as well as other sources used to build the property, requires management to screen all applicants carefully. All potential residents must qualify based on projected annual income (including all assets), household size, credit and rental history, and criminal background screening. The LIHTC program also has restrictions related to full-time students, which require us to determine a student's eligibility on a quarterly or semester basis. This screening and verification process is applied equally to every applicant who applies for the affordable apartments. **Applicants will also be subject to eligibility determination by the Housing Authority of the City of Pasadena.**

PASADENA LOCAL PREFERENCE INFORMATION

As required by the City of Pasadena, Heritage Square offers the following preferences. This preference applies during the initial lease-up phase of the building.

Priority	Priority Group
Resides and works in Pasadena	First
Resides (but does not work) in Pasadena	Second
Works (but does not reside) in Pasadena	Third
Involuntarily displaced from City	Fourth
All other applicants	Fifth

You must submit proof of preference when you are contacted for processing. If you are unable to provide the necessary preference documentation your application will be determined as non-preference. ****DO NOT SUBMIT THIS INFORMATION WITH YOUR PRE-APPLICATION PACKET. THIS IS ONLY REQUIRED AT THE TIME OF INTERVIEW****

If at least one member of your household is a resident of the City of Pasadena, you must provide one of the following items to prove your residential address:

1. **Driver's license** showing current Pasadena address
2. **Voter registration card** showing current Pasadena address
3. **Social Security payment** or **current printout of benefits** in applicant's name, showing current Pasadena address
4. **Current lease agreement** in applicant's name, showing Pasadena address
5. **Property tax bill** and grant deed in applicant's name, showing Pasadena address
6. **Utility bill** (i.e.: water, gas, electricity) in the applicant's name with, with a service address showing current Pasadena address



If at least one member of your household works **at least 20 hours per week** in the City of Pasadena or retired from employment in the City of Pasadena, you must provide one item from group A and one item from group B:

Group A (to prove employment)

1. **Pay Stub** indicating applicant's name
2. **W-2 or Tax Return** with employment information, indicating applicant's name
3. **Payroll record** from employer, indicating applicant's name

Group B (to prove that employer is located in Pasadena)

1. **Business license** filed with the City of Pasadena
2. **Letter from employer** on employer's letterhead
3. **Phone book listing**, with address of business

If at least one member of your household has been **involuntarily displaced from the City of Pasadena**, you must demonstrate that, by not fault of the applicant, one of the following criteria has been met including the submission of the appropriate documentation to the owner/agent as cited below:

- i. **Disaster or Government Action.** Written verification by the displacing unit or agency of government, (i.e., HUD, City departments, etc.) or by a service agency such as the Red Cross.
- ii. **Termination of tenancy.** Written notification by the property owner/agent to the applicant of the termination of the applicant tenancy for no fault (i.e., sales agreements, foreclosure notices, condominium conversion, building permits, etc.).
- iii. **Domestic Violence.** Written verification from police, social service agency, court, clergy person, physician, and/or public or private facility giving shelter and/or counseling to victims.
- iv. **Witness Protection Program.** Certification by a law enforcement agency of the applicant's participation in the Witness Protection Program.
- v. **Hate Crimes.** Written statement from law enforcement agency, HUD, Housing Rights Center or other agencies responsible for non-discrimination advocacy. Statement should contain approximate number of occurrences and date of last occurrence.
- vi. **Inaccessibility of Unit.** Statement from the property owner of the critical elements that are inaccessible, and that the owner is not going to make the needed modifications, or permit the family to make the modifications.
- vii. **Substandard Housing.** Written verification from a reliable, knowledgeable professional familiar with residential construction and possessing skills and professional licenses and/or certifications consistent with those of a City of Pasadena Code Enforcement Officer.
- viii. **Homelessness.** Written verification by a public or private facility providing shelter, the police, or a social services agency certifying that the applicant lacks a fixed, regular, and adequate nighttime residence.

All forms must be fully completed in order to be processed for an apartment. Apartments will be offered on a "first qualified, first offered" basis. We suggest you work closely with your leasing associate to complete the application process as quickly as possible, and we welcome any comments you may have regarding the process.



APPLICATION PROCESS

After completing the pre-application packet, please mail it to the address provided in our cover letter. Pre-applications will be processed in the order of the random ordering and preference status. After the random ordering and priorities are applied, if your application is selected to move to the next stage of processing, the following steps will guide you on your way to residency at Heritage Square. Please remember, apartments will be offered on a First-Qualified, First-Offered basis.

Completing a Full Application

You will be notified when it is your turn to be processed. At this time, you will need to complete a full application and provide preference documentation if you claimed a preference.

Meeting Your Leasing Associate for Document Review - We are Here to Help You

Once we have initially reviewed your full application, and if you appear to qualify for the next stage of processing, a leasing associate will schedule an appointment with you to go through the additional paperwork required and confirm the information supplied on your application. Credit checks, criminal background screening, landlord references, income and asset verifications will be required for all applicants. At your scheduled appointment, please come prepared with all requested supporting documents as outlined in the Interview Checklist. This meeting will also give you an opportunity to ask any questions you may have about the application process and the property. This interview normally takes approximately 45 minutes. All persons who will be living in the apartment, irrespective of their age, must participate in this interview. If you fail to attend the interview or provide the necessary paperwork, your application will be withdrawn. Your patience and cooperation is appreciated.

When an application has been processed, and all the documentation has been received and approved by owners and the John Stewart Company (JSCO), the household will be forwarded to the City's Housing Department for determination of Section 8 eligibility. Applicants that are determined to be Section 8 eligible will be notified by JSCO and offered an apartment on a first qualified, first offered basis.

Apartment Offer

When all documents have been received, verified and approved, qualified applicants will be invited back to view the apartment that has been selected for them. Remember that you will only receive one offer of an apartment. All offers will be confirmed in writing. If you decline that apartment or fail to appear for your move-in appointment, you will be considered to have withdrawn your application. Future residents are not able to choose a floor plan or location.

12 Month Lease Term

Leases will be for a minimum term of one year.

Pets

For more information, please speak to your leasing associate at your interview regarding our pet policy. Pets are limited to one per household with a \$250 deposit. This does not apply for service/companion animals.

Parking

There are a very limited number of resident spaces and parking is not guaranteed for every unit. Parking is restricted to cars owned by resident(s). All cars must be registered in the name of the resident; and resident(s) must provide proof of current auto insurance and must provide a valid driver's license. All cars must be for personal use only, be in working order, and be maintained in a safe condition at all times. Vehicles not in compliance will be towed at the owner's expense. No exceptions. Accessible spaces are available, but cannot be assigned.



INTERVIEW CHECKLIST

****DO NOT SUBMIT THIS INFORMATION WITH YOUR PRE-APPLICATION PACKET. THIS IS ONLY REQUIRED AT THE TIME OF INTERVIEW. ****

If you choose to apply and we contact you for an interview, you will be required to provide the following information:

For all adult household members age 18 and older:

- **Valid state or national picture ID** (i.e. Driver's License, Passport, etc.).
- **Preference Documentation (if applicable)**
- **Employment:** Copies of the first pay-stub for the current calendar year and the most current 6 months of consecutive pay-stubs (14 stubs if paid bi-weekly; 12 stubs if paid semi-monthly; 26 stubs if paid weekly) or equivalent proof of other income. A copy of the most recent IRS tax return is required for cash paid employment.
- **Unemployment Insurance/State Disability/Workers Compensation:** Award letter and most recent 3 months of paystubs.
- **Self-Employment:** Copy of last year IRS Tax Return including Schedule C and list of current or most recent clients.
- **GA/AFDC/TANF:** Notice of Action letter (dated within the last 30 days)
- **Pensions & Annuities:** Copy of award letter and the last 3 payment stubs
- **Real Estate:** Copy of the most recent mortgage statement, & other relevant owner information.
- **Student:** Name and Address of school & copy of the unofficial class transcript.

For all household members of any age:

- **Social Security Cards and Birth Certificates** (for all household members)
- **SSI or SSA:** Printout of the benefit letter (the date on the letter needs to be within 30 days of your scheduled appointment date).
- **Bank accounts:** Copies of the 6 most recent bank statements for all bank accounts. (For electronic paycards: printout or receipt with current balance and copy of the paycard.)
- **Trusts, Stocks, Bonds, Other Investments:** Submit statements for the most recent 3 quarters (9 months), along with most recent 1099 statement for each account.
- **Life Insurance and/or Burial Policy:** Submit complete copy of policy
- **Child Support:** Current notice from D.A. Office or court order, and the most recent 6 months of payment statements.
- **Alimony:** Current notice from D.A. Office or court order, and the most recent 3 months of payment statements.
- **Financial Assistance:** This is regular gifts or payments from anyone outside of the household (includes anyone paying your bills). We will require a notarized written letter from the person providing assistance stating the amount and length of assistance.
- **Other:** Documentation for regular pay as a member of the Armed Forces, severance payments, settlements, lottery winnings or inheritances, death benefits or life insurance dividends, trust benefits, or any other source of income not listed.



Heritage Square - Pre-Application

Please fill out this form completely. Incomplete forms cannot be processed.

First Name:		Last Name:					
Mailing Address			Apt #	Phone#1			
City		State	Zip	Phone#2			
Contact/Interpreter Name:			Contact/Interpreter Phone:				
How many people are in your household?			What is your household's estimated annual gross income?				
			\$ _____				
OPTIONAL – For informational purposes only (check all that apply) Race <input type="checkbox"/> American Indian or Alaska Native <input type="checkbox"/> Black or African American <input type="checkbox"/> Asian <input type="checkbox"/> Native Hawaiian or Other Pacific Islander <input type="checkbox"/> White <input type="checkbox"/> Other: _____ <input type="checkbox"/> Decline to State Ethnicity <input type="checkbox"/> Hispanic <input type="checkbox"/> Non-Hispanic <input type="checkbox"/> Decline to State		How did you hear about us? <input type="checkbox"/> Craigslist <input type="checkbox"/> Drive By <input type="checkbox"/> Ad <input type="checkbox"/> Family/Friend Other: _____		Will you or anyone in your household require a live-in care attendant? <input type="checkbox"/> Yes <input type="checkbox"/> No			
				Do you have a current Section 8 voucher? <input type="checkbox"/> Yes <input type="checkbox"/> No			
		OPTIONAL – Do you require an ADA special unit design features? <input type="checkbox"/> Yes <input type="checkbox"/> No If "Yes": <input type="checkbox"/> Hearing Impairment <input type="checkbox"/> Mobility Impairment (All reasonable accommodations will be verified with a medical professional)					
Name of Applicant #1		Social Security Number	Date of Birth	Age	Relationship to Applicant #1	M/F	Check if Disabled
					SELF		<input type="checkbox"/>
Name of Applicant #2							<input type="checkbox"/>
Name of Applicant #3							<input type="checkbox"/>

I declare under penalty of perjury under the laws of the state of California that the enclosed information is true and correct. Inquiries may be made to verify the statements herein. I authorize the release of the requested information to Heritage Square for purposes of income verification, credit/UD history.

Adult Applicant #1 Signature Date

Adult Applicant #2 Signature Date

Adult Applicant #3 Signature Date



Per the City's Local Preference and Priority Guidelines:

Does anyone in your household live in the City of Pasadena?

- Yes No

If "Yes" please provide the following:

Name of Applicant: _____

What address does the preference apply to? Please write complete home address

_____ Pasadena, CA _____

(Proof will be required)

Does anyone in your household work at least 20 hours per week in the City of Pasadena or did they retire from employment in the City of Pasadena?

- Yes No

If "Yes" please provide the following:

Name of Applicant: _____ Name of Employer: _____

Employer's Address:

_____ Pasadena, CA _____

(Proof of employment and proof of employer location will be required)

Has anyone in your household been involuntarily displaced from the City of Pasadena?

- Yes No

If "Yes": Please briefly explain the displacement that was due to an official act initiated by the City of Pasadena in connection with code enforcement, condemnation (occupancy prohibited due to a code violation), eminent domain, public improvement, a development program or as cited in details in the Cover Letter.

(Proof of displacement will be required)



Heritage Square
GROUNDS FOR DENIAL OF RENTAL APPLICATION

It is the responsibility of each applicant to provide any and all information required to determine eligibility. The following lists the reasons why we might deny your application:

- 1. Credit** (student loans and medical expenses are excluded)
 - a. Total unmet credit problems (including governmental tax liens) in excess of \$2,500.
 - b. A bankruptcy (within the last three years).
 - c. A total of seven (7) unmet credit problems of any value.
- 2. Rental History**
 - a. A judgment against an applicant obtained by the current or previous landlord.
 - b. An unmet obligation owed to a previous landlord.
 - c. The applicant must have made timely payments of the last year's rental payments.
- 3. Personal History**
 - a. A history of violence or abuse, (physical or verbal), in which the applicant was determined to be the antagonist.
 - b. Current abuse of alcohol or use of illegal drugs. Use shall constitute abuse for illegal drugs (unless required by doctor's verification).
- 4. Criminal Background Check**
 - a. If any adult household member is subject to any state's sex offender lifetime registration requirement.
 - b. Felony conviction
 - c. An established pattern of criminal activity
 - d. The manufacturing, selling or possession of any drugs or illegal substances, or established pattern of manufacturing, selling or possession of any drugs or illegal substances.
 - e. Physical violence to persons or property, violent criminal activity, sexual abuse, illegal weapons possession, any form of assault, breaking and entering, burglary or drug related criminal activity, or any act that would threaten the health, safety or right to peaceful enjoyment by other residents, or employees and contractors who work with the community.
- 5. Annual Income/Occupancy standard/other program regulations**
 - a. Annual Income (including assets) not within the established restrictions for the property.
 - b. Household size must meet the established occupancy standard for the property.
 - c. Applicant must meet all program regulated eligibility requirements.
- 6. Documentation:** Each potential occupant must provide all documentation required by the selection process.
 - a. Not showing up for an interview,
 - b. Not providing a completed and signed application, release of information, grounds for denial, and application fee (if required).
 - c. Not providing landlord references covering the last five years of residency. *Please note: Applicants who have not held a rental agreement for a minimum period of twelve months within the last five years, will be required to provide references from a person not related to the applicant who has known the applicant for at least five years.*
 - d. Not providing appropriate proof of all income sources and assets.
 - e. Not providing any other documents required to determine eligibility.
- 7. Offer of an Apartment**

Applicants will be offered only one apartment. Declining the offer of an apartment is considered to be a withdrawal of the application by the applicant.
- 8. Other Eligibility Requirements**
 - a. At least one household members must be age 55. All other member must be 45 years of age or a spouse or cohabitant (other exceptions may apply – please check with your leasing agent).

I have read and understood the foregoing and find them to be reasonable reasons my rental application may be denied.

Adult Applicant # 1 Signature

Date

Adult Applicant # 2 Signature

Date

Adult Applicant # 3 Signature

Date

