

INFORMATION REQUIRED  
FOR  
AIGBURTH VALE SENIOR APARTMENTS

1. Proof of identity is required. Generally, a photo identification card is required. Applicants must be citizens of the United States.
2. Proof of Age. All residents of Aigburth Vale must be at least 62 years of age. Proof of age includes any of the following: Driver's License, Birth Certificate, or Baptismal certificate. Applications may not be taken from those who have not attained the age of 62.
3. Emergency Contact Person (include name, address, and phone number).
4. Landlord Reference with Address and Phone Number, if applicable.  
The current landlord must indicate that the applicant has made timely rental payments, maintains a neat and clean unit, and has not created disturbances that disturbed the right to quiet enjoyment of the property by others. More than two rent court notices in a twelve month period (exceptional circumstances excepted) will disqualify an applicant.
5. Proof of Income:  
The applicant must show that they meet, and do not exceed, the income guidelines established for the unit that they are applying for, and that they are able to afford that unit. Unit affordability is determined by documenting that the applicant's annual income is at least twice the amount of the annual rent. Credit checks are performed to determine if the resident has a history of default on payments. Such defaults may result in denial of application (exceptional circumstances excepted). Housing Assistance Payments are included as income for the purposes of determining affordability.  
(Provide documentation for all that apply):
  - a. Employment or Self-employment Income
  - b. Net Business Income
  - c. Current Banks Statements
  - d. Social Security Income
  - e. Supplemental Security Income (SSI)
  - f. Veteran's Pensions
  - g. Military Retirement
  - h. Income from all other pensions, annuities, insurance policies, death benefits, etc. where a periodic payment is received
  - i. Any Interest or Dividend income
  - j. Regular contributions or gifts from person(s) not residing in the unit
  - k. Income from a Rental Property
  - l. Public Assistance
  - m. Alimony (Is only counted if actually received)
  - n. Payments in lieu of earnings (Unemployment Compensation, Disability Compensation, Workers Compensation, Severance Pay, etc.)

6. Proof of Assets - Provide documentation for all that apply. Assets are possessions and/or resources that can be converted to cash and include the following:
  - a. Checking Accounts
  - b. Savings Accounts
  - c. Cash (in safety deposit boxes or kept at home)
  - d. Revocable Trust account(s).
  - e. Stocks, Bonds, Certificate of Deposit, Money Market Funds, Treasury Bills, etc.
  - f. Retirement Funds, IRA and KEOGH Accounts, any pensions and annuities
  - g. Lump Sum Receipts (inheritance, capital gains, lottery winnings, insurance settlements, etc.)
  - h. Life Insurance Policies (with cash surrender value)
  - i. Equity in Real Estate and Other Capital Investment (Principal Residence, Rental Property, Deed of Trust(s) held by the applicant) Real Estate Tax Assessment is acceptable documentation
  - j. Real Property sold within the last two years. Real Estate Tax Assessment is acceptable documentation
  - k. Personal Property held as an Investment (Gems, jewelry, coin or stamp collections, antique cars, etc.)
  - l. Gifts distributed or Disposal of an Asset for less than Market Value (if the gross amount received exceeds \$1,000.00 less than the fair market value, the transaction occurred less than two years ago, and the divestiture was not due to foreclosure, bankruptcy, divorce, or separation)
7. Current Income Tax Returns.
8. Current Mortgage Statement (Amount Owed/Monthly Payment), if applicable.