

INCOME & ASSET WORKSHEET

Clare Meadows offers income eligible senior apartments (age 55+) for those that qualify per the WHEDA (Wisconsin Housing & Economic Development Authority) Guidelines. Please Complete the below estimates to see if you think you would qualify for an income eligible apartment. Note that if you apply for an available income eligible apartment, all sources of income & assets will be verified by Clare Meadows. Verifications will be requested by Clare Meadows to each financial institution per WHEDA Guidelines.

Name(s)	Date

ESTIMATED GROSS INCOME (monthly):

- Social Security: _____
- Disability or SSI: _____
- Pension(s): _____
- Veteran Benefits: _____
- Employment: _____
- Unemployment: _____
- Alimony: _____
- Annuity Withdrawals: _____
- Dividends: _____
- Rent Paid to you _____
- Other support or income: _____

Total Monthly income: _____ **Multiplied by 12 = Annual Income:** _____ **A**

ASSETS (list the value of all assets)

- Checking: _____
- Savings/Money Market: _____
- CD's: _____
- Mutual Funds: _____
- 401K/IRA: _____
- Stocks: _____
- Bonds: _____
- Life Insurance cash surrender value: _____
- House/Real Estate (FMV): _____
- \$ gifted away past 24 mo's: _____
- Other: _____

Total Assets: _____ **Multiplied by .40%:** _____ **B**

Total Estimated Annual Gross Income (per the WHEDA Guidelines): _____ **A + B**

Income Eligibility Requirements - Income must not exceed:
 1 person household: **\$42,900**; 2 person household: **\$49,020**