



*your resource for Affordable Housing*



**Wellesley Place  
Wellesley, MA**

**OPEN HOUSE**

**Saturday, June 10, 2017**

**10:00 a.m. – 12:00 p.m.**

**Application consultations available**

Attached is the information regarding the affordable rental units at Wellesley Place in Wellesley, Massachusetts. Potential Tenants will not be discriminated against on the basis of race, color, national origin, disability, age, ancestry, children, familial status, genetic information, marital status, public assistance reciprocity, religion, sex, sexual orientation, gender identity, veteran/military status, or any other basis prohibited by law.

Located at 978R Worcester Street in Wellesley, Wellesley Place is a new 36 rental development offering 7 affordable one and two bedroom apartments, by lottery, for eligible tenants. Two of the one bedroom units are handicap accessible. One assigned garage parking space is provided to each unit. Each unit includes a washer and dryer. Pets are allowed, per the pet policy. This is a smoke free building.

The monthly rent is: One Bedroom - \$1,481-; Two Bedroom - \$1,657, heat, hot water and water/sewer are included in the rent. A utility allowance has been deducted for electricity. All affordable units will be distributed by lottery as outlined in the attached package. Please review the enclosed information packet in detail and complete the application and disclosure statement at the rear of the packet.

The rents are NOT subsidized or income based. You are responsible for the full rent. Section 8 will be accepted but it is your responsibility to find out if your Section 8 provider accepts the rent and project. The minimum income, without a Section 8 Voucher, is: One Bed – \$44,430; Two Bed: \$49,710.

***Please note: Complete financial documentation is required and must be sent with your application to participate in the lottery. Included in this package is the list of required documentation and additional forms, if applicable, to be sent in with your application. Applications will be logged in at time of receipt and will be reviewed after the application deadline. Incomplete applications will not be included in the lottery and the applicant will be notified after the application deadline.***

A Public Information Meeting will be held to answer specific questions and provide an overview of the lottery process. The meeting is scheduled for 6:30 p.m., Tuesday, June 6, 2017 located in the Great Hall at Wellesley Town Hall, 525 Washington Street, Wellesley. If you have questions and can attend this meeting please hold them until that time. If you need an Interpreter at the meeting you MUST let us know at least 2 business days prior to the Public Information Meeting.

The application deadline is July 5, 2017. You must have submitted a complete application postmarked on or before July 5th to be in the lottery. The lottery is scheduled for 6:30 p.m., Tuesday, July 18, 2017 at the Wellesley Town Hall in the Great Hall.

Thank you for your interest in affordable housing at **Wellesley Place**. We wish you the best of luck. Please contact MCO Housing Services at 978-456-8388 or email us at [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com) if you have any questions. We encourage you to advise other people or organizations that may be interested in this program and make copies of the relevant information as needed.

Sincerely,  
Maureen O'Hagan for Wellesley Place LLC



This is an important document. Please contact [AGENCY NAME] at [PHONE #] for free language assistance.

Este documento es muy importante. Favor de comunicarse con el MCO Housing en 978-456-8388 para ayuda gratis con el idioma. (Spanish)

Este é um documento importante. Entre em contato com o MCO Housing Serv no número 978-456-8388 para obter assistência gratuita com o idioma. (Portuguese)

Dokiman sila a enpòtan. Tanpri kontakte MCO Housing la nan 978-456-8388 pou asistans gratis nan lang. (Haitian Creole)

此文件為重要文件。如果您需要免費的語言翻譯幫助，請聯絡 MCO Housing 聯絡方式：978-456-8388。(Chinese, Traditional)

此文件为重要文件。如果您需要免费的语言翻译帮助，请联络 MCO Housing 联络方式：978-456-8388。(Chinese, Simplified)

Это весьма важный документ. Свяжитесь с сотрудником MCO Housing на предмет оказания бесплатной помощи по переводу на иностранный язык (978-456-8388). (Russian)  
(Phone #)

នេះគឺជាឯកសារសំខាន់។ សូមទំនាក់ទំនង MCO Housing តាមរយៈ 978-456-8388 ដើម្បីទទួលបានជំនួយ  
ផ្នែកភាសាដោយឥតគិតថ្លៃ។ [Mon-Khmer, Cambodian]

Đây là một tài liệu quan trọng. Vui lòng liên hệ MCO Housing tại 978-456-8388 để được hỗ trợ ngôn ngữ miễn phí. (Vietnamese)

Kani waa dukumentiyu muhiim ah. Fadlan MCO Housing kala soo xiriir 978-456-8388 si aad u hesho gargaar xagga luqadda oo bilaash ah. (Somali)

هذه وثيقة مهمة. يرجى الاتصال بـ MCO Housing بـ 978-456-8388 للمساعدة اللغوية المجانية.  
[Phone #] [Agency Name] (Arabic)

Ce document est très important. Veuillez contacter le MCO Housing au 978-456-8388 afin d'obtenir une assistance linguistique gratuite. (French)

Il presente è un documento importante. Si prega di contattare il MCO Housing al 978-456-8388 per avere assistenza gratuita per la traduzione. (Italian)



# Wellesley Place

## Question & Answer

The units will be leased in accordance with policies and guidelines established by the Commonwealth of Massachusetts Department of Housing and Community Development (DHCD).

### What are the qualifications required for Prospective Tenants?

- Qualify based on the following maximum income table, which is adjusted for household size:

| Household Size       | 1        | 2        | 3        | 4        |
|----------------------|----------|----------|----------|----------|
| Max Allowable Income | \$54,750 | \$62,550 | \$70,350 | \$78,150 |

### LOTTERY APPLICANT QUALIFICATIONS:

1. Household income can not exceed the above maximum gross allowable income limits.
2. When assets total \$5,000 or less, the actual income received is included in the annual income as income from assets OR when assets exceed \$5,000, annual income includes the greater of actual income from assets or a .06% imputed income calculation. Assets divested at less than full market value within two years of application will be counted a full market value when determining eligibility.
3. In addition to income and asset eligibility you will also be subject to a screening by the project and determined eligible based on that basis.
4. Households can not own a home, including homes in a trust, and lease an affordable unit.

### Are there units available for Local Preferences?

Yes, 5 units are for households who meet at least one of the Local Preference Criteria as stated in the application.

### Are there accessible/adaptable units?

Yes, the building has an elevator so the units are adaptable. There are two wheelchair accessible one-bedroom units available. Applicants with a disability who requires the wheelchair accessible units will have preference over any other preference category for the wheelchair accessible units. Applicants with disabilities may request reasonable accommodations or modifications of the housing, when such accommodations or modifications are necessary to afford the disable person equal opportunity to use and enjoy the housing.

### Are there preferences for Household Size?

In all cases, preference for the one-bedroom unit will be for households that require one bedroom. Preference for the two bedrooms will be for households requiring two bedrooms. Unit size preferences are based on the following:

1. There is a least one occupant per bedroom.
2. A husband and wife, or those in a similar living arrangement, shall be required to share a bedroom. Other household members may share but shall not be required to share a bedroom.
3. A person described in the first sentence of (2) shall not be required to share a bedroom if a consequence of sharing would be a severe adverse impact on his or her mental or physical health and the lottery agent receives reliable medical documentation as to such impact of sharing.
4. A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
5. If the applicant is in the process of a divorce or separation, the applicant must provide proof that the divorces or separation has begun or has been finalized, as set forth in the application.

### Are there considerations for minorities?

Yes, if the percentage of minority applicants in the Local Preference Pool is less than the percentage of minorities in the Surrounding HUD-defined area, currently 27%, a preliminary lottery will be held comprised of all the minority applicants who do not qualify for the Local Preference Pool. These minority applicants would be drawn at random from the general pool until the percentage in the local pool closely approximates the percentage in the surrounding HUD-defined area. Applicants not selected for the local pool would be in the Open Pool only.



**What happens if my household income exceeds the income limit?**

Annually you will be recertified for eligibility. Once your household income exceeds 140% of the maximum allowable income adjusted for household size, then after the end of your current lease you will have the option of staying in your unit and paying the market rent or not renewing your lease.

**Lottery Process**

Due to the nature of the affordable units’ availability it is important for everyone to understand the procedure. Please understand the allowable income guidelines are adjusted based upon your household size. Also be advised that the program and its requirements are subject to changes in local, state or federal regulations.

**Lottery Pools**

Seven affordable units are available by lottery at Wellesley Place. The lottery has two pools: Local and Open. You must meet at least one of the Local Preference Criteria to be included in the Local Pool. The units’ breakdown as follows:

| <b>Unit Size</b> | <b># of Units</b> | <b>Local Pool</b> | <b>Open Pool</b> |
|------------------|-------------------|-------------------|------------------|
| One Bedroom      | 4                 | 3                 | 1                |
| Two Bedroom      | 3                 | 2                 | 1                |

All of the applicants for a given pool will be pulled at the time of the lottery. This will establish the rankings for the distribution of units meaning for the two-bedroom Local Pool the first two applicants that meet the household preference size will have the initial opportunity to lease. There are two wheelchair accessible one-bedroom units available. Applicants with a disability who requires the wheelchair accessible units will have preference over any other preference category for the wheelchair accessible units. If the wheelchair accessible units are available after the lottery they will be distributed through either the local pool or open pool, keeping in mind 5 units are for local preference.

If you request a bedroom size larger than allowed per the unit size preferences, we will move to the next person on the list that requires the appropriate bedroom size. You are only eligible for the bedroom size that meets the unit size preferences as stated above. We are not able to provide a unit larger than you are eligible for as you would be overhoused.

Once the lottery rankings have been determined your information will be forwarded to the Leasing Office for credit and background checks. If the Leasing Office determines you are eligible then you will be offered a unit. You need to be determined eligible by MCO Housing Services and the Leasing Office. If either determines you do not meet the eligibility criteria, then you will not be able to lease a unit.

**Time Frame**

It is estimated Wellesley Place will be available for immediate occupancy.

**Acceptance of Units**

Applicants may not have a choice of unit locations, style or schedules. You will not be able “pass” on a unit and wait for another unit. If you choose not to take a unit, when offered, you will go to the bottom of the list and may not have another opportunity.

**Summary**

We hope this helps explain the process by which the units will be distributed. It can be a lengthy and sometimes complicated process. We greatly appreciate your participation and wish you the best of luck in the lottery process.

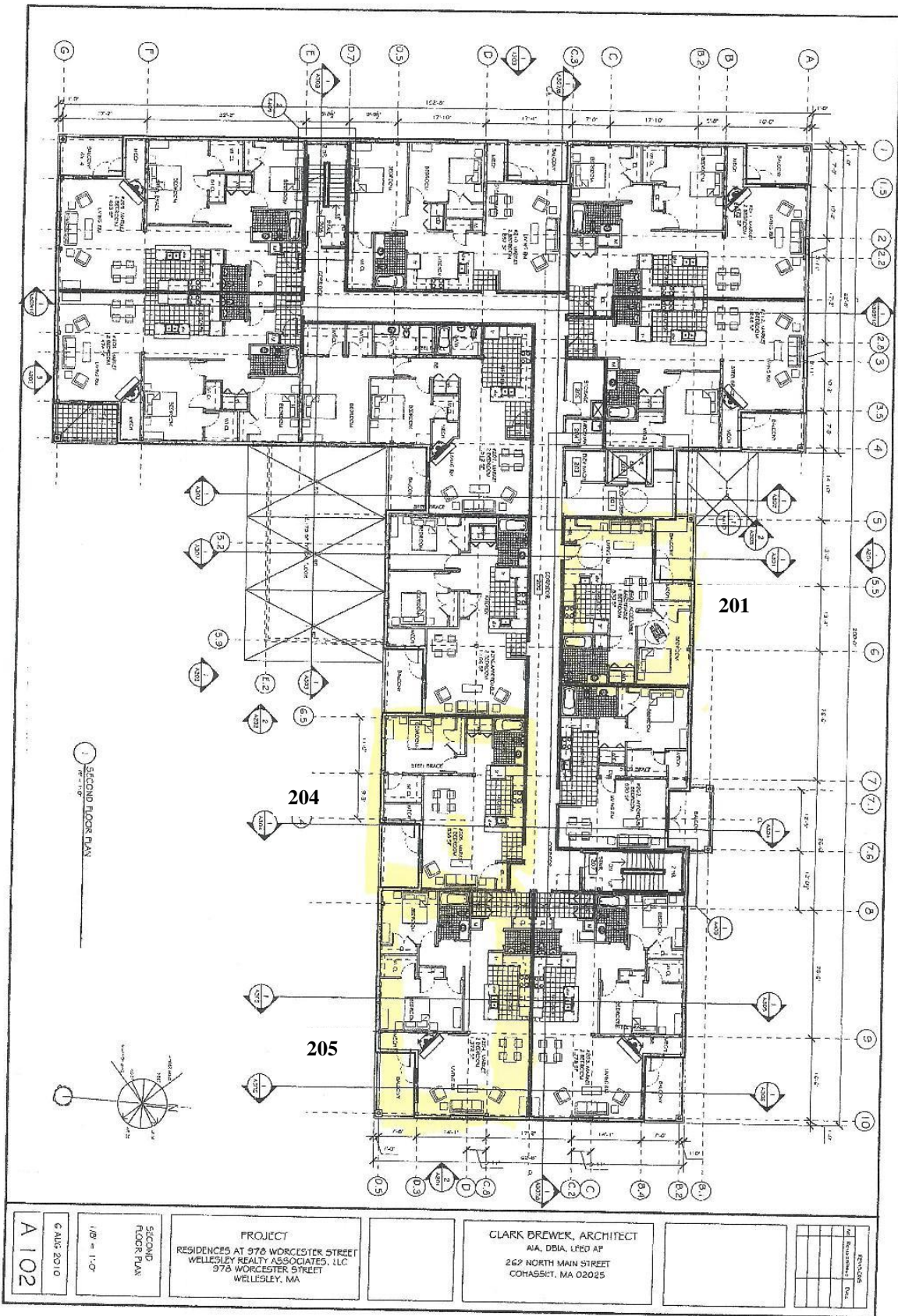


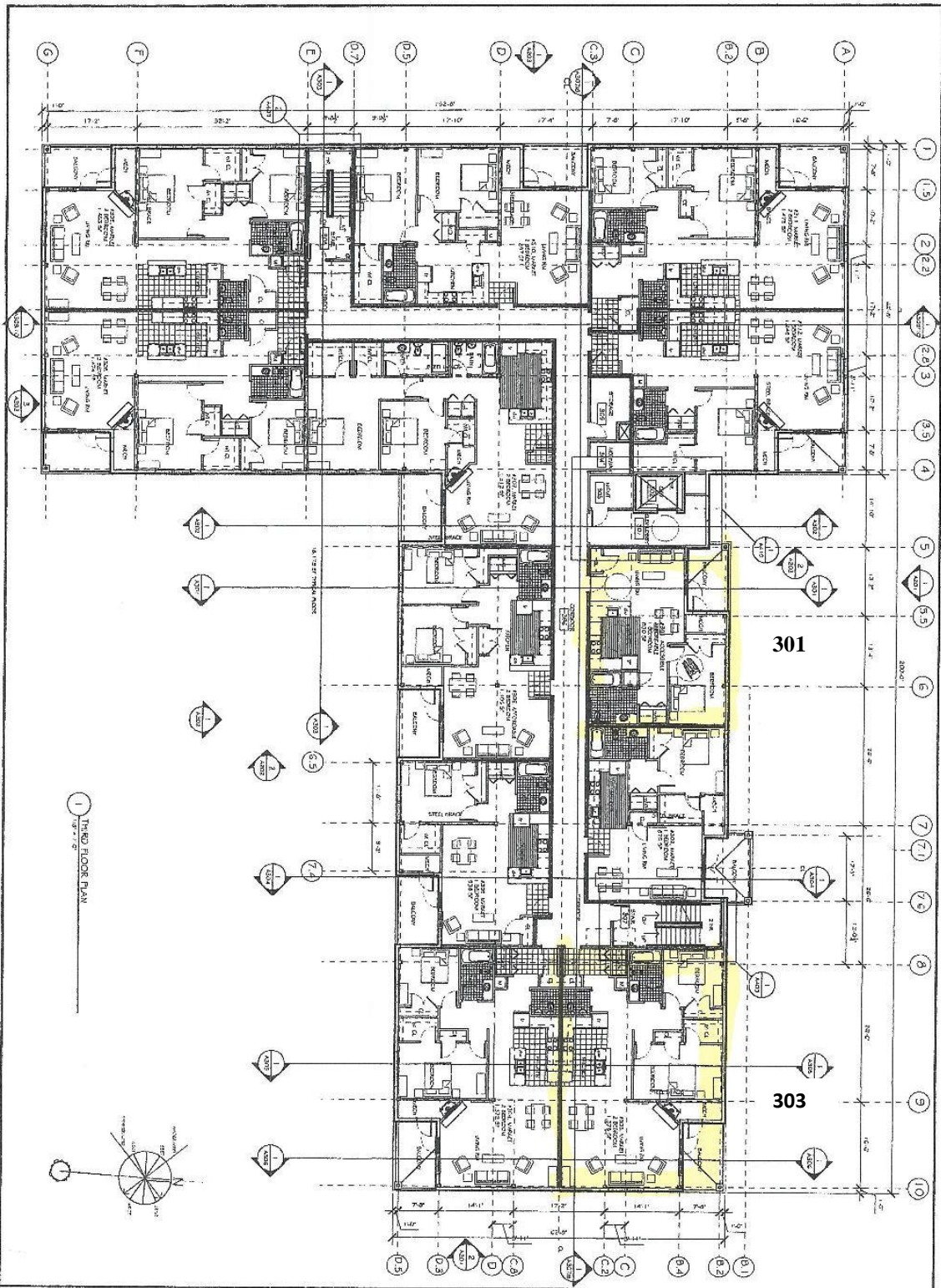
## Affordable Units

| Unit # | # of Beds | # of Baths | Sq. ft. |
|--------|-----------|------------|---------|
| 201(H) | 1         | 1          | 760     |
| 204    | 2         | 2          | 1,260   |
| 205    | 1         | 1          | 985     |
| 301(H) | 1         | 1          | 760     |
| 303    | 2         | 2          | 1,260   |
| 401    | 1         | 1          | 760     |
| 404    | 2         | 2          | 1,260   |

**(H) = Handicap Accessible**



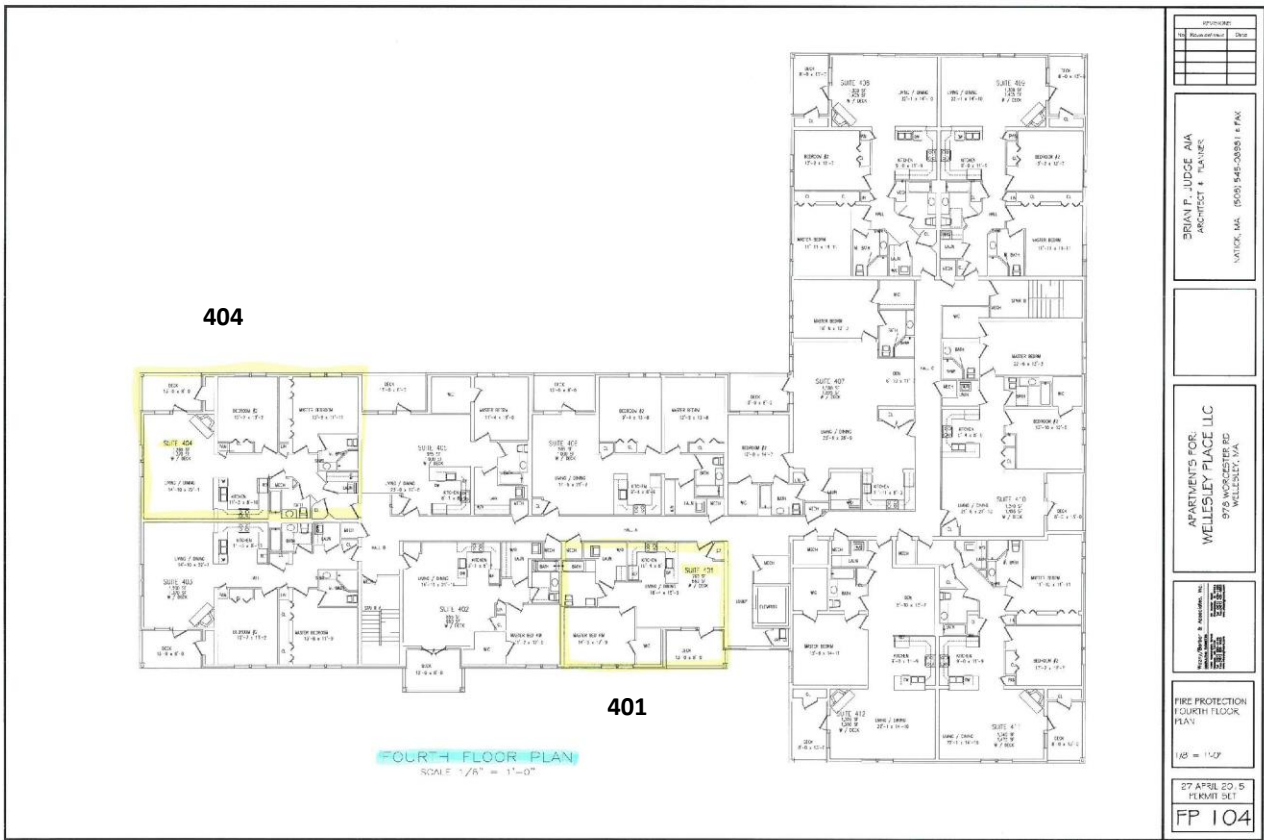




1 THIRD FLOOR PLAN

| <p>A 103</p> <p>5 AUG 2010</p> | <p>THIRD FLOOR PLAN</p> <p>1/8" = 1'-0"</p> | <p>PROJECT</p> <p>RESIDENCES AT 978 WORCESTER STREET</p> <p>WELLESLEY REALTY ASSOCIATES, LLC</p> <p>978 WORCESTER STREET</p> <p>WELLESLEY, MA</p> |  | <p>CLARK BREWER, ARCHITECT</p> <p>AIA, DDIA, LEED AP</p> <p>262 NORTH MAIN STREET</p> <p>COHASSET, MA 02025</p> |  | <table border="1"> <thead> <tr> <th>NO.</th> <th>DESCRIPTION</th> <th>DATE</th> </tr> </thead> <tbody> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> <tr> <td> </td> <td> </td> <td> </td> </tr> </tbody> </table> | NO. | DESCRIPTION | DATE |  |  |  |  |  |  |  |  |  |
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| NO.                            | DESCRIPTION                                 | DATE  |  |   |  |  |     |             |      |  |  |  |  |  |  |  |  |  |
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| REVISIONS |             |
|-----------|-------------|
| No.       | Description |
|           |             |
|           |             |
|           |             |

BRYAN P. JUDGE, AIA  
 ARCHITECT & PLANNER  
 WATICE, MA. (508) 545-3081 x 404

APARTMENTS FOR  
 WELLSLEY PLACE LLC  
 970 WASHINGTON STREET  
 WELLSLEY, MA



FIRE PROTECTION  
 FOURTH FLOOR  
 PLAN

1/8" = 1'-0"

27 APRIL 2015  
 PERMIT SET  
 FP 104





## Required Personal Identification and Income Verification Documents

### TO BE RETURNED WITH APPLICATION

Provide one copy of all applicable information. Complete financial documentation is required and must be sent with your application to participate in the lottery. Incomplete applications will not be included in the lottery and the applicant will be notified after the application deadline. If you have any questions please call, 978-456-8388.

Please initial each that are applicable, and provide the documents, or write N/A if not applicable and return this sheet with your application.

1. \_\_\_\_ Identification for each household member, i.e. Social Security Card, Birth Certificate etc.
2. \_\_\_\_ Copy of Section 8 voucher or other housing voucher, if you have one.
3. \_\_\_\_ Federal Tax Returns – Last Three Years – NO STATE TAX RETURNS
4. \_\_\_\_ W2 and/or 1099-R Forms: Last Three Years
5. \_\_\_\_ Five (5) **consecutive** pay stubs ending within one month of lottery application for all jobs (check/direct deposit stubs). For unemployment, copies of unemployment checks or DOR verification stating benefits received. Same for disability compensation, worker’s compensation and/or severance pay.
6. \_\_\_\_ Full amount of periodic amounts received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of periodic receipts.
7. \_\_\_\_ Child support and alimony: court document indicating the payment amount or copy of divorce papers.
8. \_\_\_\_ Interest, dividends and other net income of any kind from real or personal property.
9. Asset Statement(s): provide **current** statements of all that apply, unless otherwise noted:
  - \_\_\_\_ Checking accounts – **Three (3)** months of statements – EVERY PAGE – FRONT AND BACK
  - \_\_\_\_ Pre-paid debit card statements – current month
  - \_\_\_\_ Saving accounts – current statement
  - \_\_\_\_ Revocable trusts
  - \_\_\_\_ Equity in rental property or other capital investments
  - \_\_\_\_ Investment accounts, including stocks, bonds, Treasury Bills, Certificates of Deposit, Mutual Funds and Money Market Accounts including all individual retirement accounts, 401K, Keogh accounts and Retirement and Pension funds.
  - \_\_\_\_ Cash value of Whole Life or Universal Life Insurance Policy.
  - \_\_\_\_ Personal Property held as an investment
  - \_\_\_\_ Lump-sum receipts or one-time receipts
10. \_\_\_\_ Proof of student status for dependent household members over age of 18 and full-time students.
10. \_\_\_\_ A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application.
11. \_\_\_\_ If the applicant is in the process of a divorce or separation, the applicant must provide legal proof that the divorce or separation has begun or has been finalized, as set forth in the application.
12. If you are self-employed you MUST provide a detail expense and income statement for the previous 12 months and three months of business checking and savings accounts.

Print Applicants Name: \_\_\_\_\_

Applicants Signature

DATE

Co-Applicants Signature

DATE



# Wellesley Place

## LOTTERY APPLICATION

**For Office Use Only:**

Date Appl. Rcvd: \_\_\_\_\_

Household Size: \_\_\_\_\_

Lottery Code: \_\_\_\_\_

Local: Yes/No

**Application Deadline: July 5, 2017**

**PERSONAL INFORMATION:**

Date: \_\_\_\_\_

Name: \_\_\_\_\_

Address: \_\_\_\_\_ Town: \_\_\_\_\_ Zip: \_\_\_\_\_

Home Telephone: \_\_\_\_\_ Work Telephone: \_\_\_\_\_ Cell: \_\_\_\_\_

Email: \_\_\_\_\_ Have you ever owned a home? \_\_\_ If so, when did you sell it? \_\_\_

LOCAL PREFERENCE: (Check all that apply) Proof of Local Preference will be required if you have the opportunity to lease.

- Current Wellesley Resident
- Currently employed by the Town of Wellesley or the Wellesley School Department
- Employees of local Wellesley businesses or with a bonafide offer of employment
- Household with children attending the Wellesley School System, such as METCO students

Do you have a Section 8 voucher (the units are NOT subsidized or income based): \_\_\_ Yes \_\_\_ No

Bedroom Size: \_\_\_ One Bedroom; \_\_\_ Two Bedroom

Do you require a wheelchair accessible unit? \_\_\_ Yes \_\_\_ No

**FINANCIAL WORKSHEET:** (Include all Household Income, which includes gross wages, retirement income (if drawing on it for income), business income, veterans' benefits, alimony/child support, unemployment compensation, social security, pension/disability income, supplemental second income and dividend income.)

Applicants Monthly Base Income (Gross) \_\_\_\_\_

Other Income, specify \_\_\_\_\_

Co-Applicants Monthly Base Income (Gross) \_\_\_\_\_

Other Income, specify \_\_\_\_\_

**TOTAL MONTHLY INCOME:** \_\_\_\_\_

**Household Assets:** (This is a partial list of required assets. Complete all that apply with current account balances)

Checking (avg balance for 6 months) \_\_\_\_\_

Savings \_\_\_\_\_

Stocks, Bonds, Treasury Bills, CD or \_\_\_\_\_

Money Market Accounts and Mutual Funds \_\_\_\_\_

Individual Retirement, 401K and Keogh accounts \_\_\_\_\_

Retirement or Pension Funds (amt you can w/d w/o penalty) \_\_\_\_\_

Revocable trusts \_\_\_\_\_

Equity in rental property or other capital investments \_\_\_\_\_

Cash value of whole life or universal life insurance policies \_\_\_\_\_

**TOTAL ASSETS** \_\_\_\_\_

*(Please complete reverse side)*

Language assistance will be available by appointment at no charge. Call 978-456-8388 to schedule.



**EMPLOYMENT STATUS: (include for all working household members. Attach separate sheet, if necessary.)**

Employer: \_\_\_\_\_  
Street Address: \_\_\_\_\_  
City/State/Zip: \_\_\_\_\_  
Date of Hire (Approximate): \_\_\_\_\_  
Annual Wage - Base: \_\_\_\_\_  
Additional: \_\_\_\_\_ (Bonus, Commission, Overtime, etc.)

**ABOUT YOUR HOUSEHOLD: (OPTIONAL)**

You are requested to fill out the following section in order to assist us in fulfilling affirmative action requirements. Please be advised that you should fill this out based upon family members that will be living in the apartment/unit. Please check the appropriate categories:

|                                     | Applicant | Co-Applicant | (#) of Dependents |
|-------------------------------------|-----------|--------------|-------------------|
| Non-Minority                        | _____     | _____        | _____             |
| Black or African American           | _____     | _____        | _____             |
| Hispanic or Latino                  | _____     | _____        | _____             |
| Asian                               | _____     | _____        | _____             |
| Native American or Alaskan Native   | _____     | _____        | _____             |
| Native Hawaiian or Pacific Islander | _____     | _____        | _____             |

The total household size is \_\_\_\_\_ (This is very important to determine the maximum allowable income for your household.)

Household Composition (including applicant(s))

Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_ Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_  
Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_ Name \_\_\_\_\_ Relationship \_\_\_\_\_ Age \_\_\_\_\_

**SIGNATURES:**

The undersigned warrants and represents that all statements herein are true. It is understood that the sole use of this application is to establish the preliminary requirements for placement into a lottery to have an opportunity to lease an affordable unit at Wellesley Place. I (we) understand if selected all information provided shall be verified for accuracy at the time of lease.

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Applicant(s)

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Co-Applicant(s)

Based upon the preliminary information provided, it is my judgment that the applicant should be allowed to participate in the lottery for affordable units at Wellesley Place. If selected all information provided shall be verified for accuracy at the time of lease.

Signature \_\_\_\_\_ Date: \_\_\_\_\_  
Certifying Agent (MCO Housing Services)

**Return with signed Affidavit & Disclosure Form, complete financial documentation and Release of Information by mail, fax or email to:**

MCO Housing Services  
P.O. Box 372  
Harvard, MA 01451

**Drop off: 206 Ayer Road, Harvard, email: [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com)**



# Wellesley Place

## Affidavit & Disclosure Form

I/We understand and agree to the following conditions and guidelines regarding the distribution of the affordable units at Wellesley Place through DHCD in Wellesley, MA:

1. The gross annual household income for my family does not exceed the allowable limits as follows:

| Household Size       | 1        | 2        | 3        | 4        |
|----------------------|----------|----------|----------|----------|
| Max Allowable Income | \$54,750 | \$62,550 | \$70,350 | \$78,150 |

Income from all family members must be included.

- I/We understand the calculation of income will include the higher of actual income from assets (if over \$5,000) or an imputation of .06% of the value of total household assets which is added to a household's income in determining eligibility. Assets divested at less than full market value within two years of application will be counted at full market value in determining eligibility.
- The household size listed on the application form includes only and all the people that will be living in the residence.
- I/We certify all data supplied on the application is true and accurate to the best of my/our knowledge and belief under full penalty of perjury. I/We understand that providing false information will result in disqualification from further consideration.
- I/We understand that by being selected in the lottery does not guarantee that I/we will be able to lease a unit. I/We understand that all application data will be verified and additional financial information may be required, verified and reviewed in detail prior to leasing a unit. I/We also understand that the Project's Owner will also perform its own screening to determine our eligibility to lease.
- I/We understand that if selected I/we will be offered a specific unit. I/We will have the option to accept the available unit, or to reject the available unit. If I/we reject the available unit I/we will move to the bottom of the waiting list and will likely not have another opportunity to lease an affordable unit at Wellesley Place.
- Program requirements are established by DHCD and are enforced by DHCD. I/We agree to be bound by whatever program changes that may be imposed at any time throughout the process. If any program conflicts arise, I/we agree that any determination made by DHCD is final.
- I/We certify that no member of our family has a financial interest in Wellesley Place.
- I/We understand there may be differences between the market and affordable units and accept those differences.
- I/We understand that if my/our total income exceeds 140% of the maximum allowable income at the time of annual eligibility determination, after the end of my then current lease term I will no longer be eligible for the affordable rent and have the option of moving out or paying market rent.

I/We have completed an application and have reviewed and understand the process that will be utilized to distribute the available units at Wellesley Place. I/We am qualified based upon the program guidelines and agree to comply with applicable regulations.

\_\_\_\_\_  
Applicant

\_\_\_\_\_  
Co-Applicant

\_\_\_\_\_  
Date

**Return with completed application, complete financial documentation and Release of Information Form by mail, fax or email to:**

MCO Housing Services  
P.O. Box 372  
Harvard, MA 01451

**Drop off: 206 Ayer Road, Harvard, email: [lotteryinfo@mcohousingservices.com](mailto:lotteryinfo@mcohousingservices.com)**



**Wellesley Place**  
**Wellesley, MA**

***Release of Information Authorization Form***

Date: \_\_\_\_\_

I/We hereby authorize MCO Housing Services, Wellesley Place Leasing Office, Wellesley Place LLC, or any of its assignees to verify any and all income, assets and other financial information, to verify any and all household, resident location and workplace information and directs any employer, landlord or financial institution to release any information to MCO Housing Services, Wellesley Place Leasing Office, Wellesley Place LLC, or any of its assignees and consequently the Projects Administrator, for the purpose of determining income eligibility for Wellesley Place.

A photocopy of this authorization with my signature may be deemed to be used as a duplicate original.

\_\_\_\_\_  
Applicant Name (Please Print)

\_\_\_\_\_  
Applicant Name (Please Print)

\_\_\_\_\_  
Applicant Signature

\_\_\_\_\_  
Applicant Signature

Mailing Address  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_  
\_\_\_\_\_

**Return with completed application and Affidavit and Disclosure Form by mail, fax or email to:**

**MCO Housing Services, P.O. Box 372, Harvard, MA 01451**  
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