



**OREGON—TAX CREDIT  
RENTAL APPLICATION**

TO BE COMPLETED BY EACH ADULT APPLICANT

ALL UNITS  
SUBJECT TO  
AVAILABILITY



OFFICE USE ONLY

NEW MOVE-IN     OCCUPANT TURNING 18     ADD/REMOVE ROOMMATE     TRANSFER

PROPERTY NAME / NUMBER \_\_\_\_\_

UNIT NUMBER SAMPLE ADDRESS SAMPLE

DATE UNIT WANTED SAMPLE UNIT RENT \$ SAMPLE NON-REFUNDABLE SCREENING CHARGE \$ SAMPLE

OWNER / AGENT SAMPLE PHONE SAMPLE

OWNER / AGENT ADDRESS SAMPLE

SMOKING POLICY:  ALLOWED - ENTIRE PREMISES     PROHIBITED - ENTIRE PREMISES     ALLOWED IN LIMITED AREAS (ASK MANAGEMENT FOR DETAILS)

APPLICANT

**PLEASE DO NOT LEAVE ANYTHING BLANK. IF NOT APPLICABLE, WRITE "N/A."**

APPLICANT FULL LEGAL NAME SAMPLE EMAIL SAMPLE

PREVIOUS NAMES, ALIASES OR NICKNAMES USED SAMPLE

DATE OF BIRTH SAMPLE SOC. SECURITY # SAMPLE APPLICANT PHONE ( ) SAMPLE

GOVERNMENT ISSUED PHOTO I.D. TYPE SAMPLE # SAMPLE / STATE SAMPLE EXP. DATE SAMPLE

CURRENT STREET ADDRESS SAMPLE

CITY SAMPLE STATE SAMPLE ZIP SAMPLE DATE YOU MOVED IN SAMPLE

HAVE YOU APPLIED TO ANY OTHER LOCATIONS MANAGED BY LANDLORD IN THE LAST 60 DAYS?  YES  NO

IF YES, WHERE? SAMPLE

CURRENT LANDLORD NAME SAMPLE LANDLORD PHONE ( ) SAMPLE

LANDLORD EMAIL SAMPLE LANDLORD FAX ( ) SAMPLE

STREET ADDRESS (OR APT NAME) SAMPLE CITY SAMPLE STATE SAMPLE ZIP SAMPLE

APPLICANT FORMER STREET ADDRESS SAMPLE

CITY SAMPLE STATE SAMPLE ZIP SAMPLE FROM SAMPLE TO SAMPLE

FORMER LANDLORD NAME SAMPLE LANDLORD PHONE ( ) SAMPLE

LANDLORD EMAIL SAMPLE LANDLORD FAX ( ) SAMPLE

STREET ADDRESS (OR APT NAME) SAMPLE CITY SAMPLE STATE SAMPLE ZIP SAMPLE

OTHER STATES AND COUNTIES YOU HAVE LIVED IN DURING THE PAST 5 YEARS SAMPLE

INCOME

ARE YOU SELF-EMPLOYED?  YES  NO    ARE YOU A FULL-TIME STUDENT?  YES  NO

CURRENT EMPLOYER SAMPLE PHONE ( ) SAMPLE

HR EMAIL SAMPLE HR FAX ( ) SAMPLE

STREET ADDRESS SAMPLE CITY SAMPLE STATE SAMPLE ZIP SAMPLE

POSITION SAMPLE DATE HIRED SAMPLE GROSS MONTHLY INCOME \$ SAMPLE

ADDITIONAL CURRENT EMPLOYER SAMPLE PHONE ( ) SAMPLE

HR EMAIL SAMPLE HR FAX ( ) SAMPLE

STREET ADDRESS SAMPLE CITY SAMPLE STATE SAMPLE ZIP SAMPLE

POSITION SAMPLE DATE HIRED SAMPLE GROSS MONTHLY INCOME \$ SAMPLE

**OTHER MONTHLY INCOME:** THIS INCLUDES, BUT IS NOT LIMITED TO, WELFARE ASSISTANCE, SOCIAL SECURITY, PENSIONS, DISABILITY, MILITARY PAY/ BENEFITS, UNEMPLOYMENT, CHILD SUPPORT, ALIMONY, STUDENT GRANTS/LOANS, SELF-EMPLOYMENT, LOTTERY INCOME, INCOME FROM THE SALE OF PROPERTY, INCOME FROM TRUSTS AND ANY OTHER INCOME RECEIVED FROM PEOPLE NOT RESIDING WITH YOU.

SOURCE SAMPLE \$ SAMPLE SOURCE SAMPLE \$ SAMPLE

ASSETS

**ASSETS:** THIS INCLUDES, BUT IS NOT LIMITED TO, CHECKING/SAVINGS ACCOUNTS, 401K, MONEY MARKET ACCOUNTS, IRA, STOCKS/BONDS, CD'S, TRUSTS, WHOLE OR UNIVERSAL LIFE INSURANCE POLICIES, CASH HELD IN SAFETY DEPOSIT BOXES, ITEMS HELD AS INVESTMENTS, ETC.

ASSET TYPE	FINANCIAL INSTITUTION	ASSET TYPE	FINANCIAL INSTITUTION
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>

OTHER OCCUPANTS

NAME	DATE OF BIRTH	SOCIAL SECURITY #	FULL-TIME STUDENT?
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO
<u>SAMPLE</u>	<u>SAMPLE</u>	<u>SAMPLE</u>	<input checked="" type="checkbox"/> YES <input checked="" type="checkbox"/> NO

VEHICLES	MAKE	MODEL	COLOR	STATE	LICENSE PLATE #	OWNER
	SAMPLE	SAMPLE	SAMPLE	SAMPLI	SAMPLE	SAMPLE
	SAMPLE	SAMPLE	SAMPLE	SAMPLI	SAMPLE	SAMPLE
	SAMPLE	SAMPLE	SAMPLE	SAMPLI	SAMPLE	SAMPLE

IF CHECKED, PETS ARE NOT ALLOWED AT THIS PROPERTY.  
 IF CHECKED, PETS ARE ALLOWED SUBJECT TO MANAGEMENT APPROVAL. HOW MANY PETS WILL BE RESIDING IN THIS UNIT? SAMPLE

NAME	SAMPLE	TYPE	SAMPLE	BREED	SAMPLE	AGE	SAMPLE	WEIGHT	SAMPLE
NAME	SAMPLE	TYPE	SAMPLE	BREED	SAMPLE	AGE	SAMPLE	WEIGHT	SAMPLE
NAME	SAMPLE	TYPE	SAMPLE	BREED	SAMPLE	AGE	SAMPLE	WEIGHT	SAMPLE

EMERGENCY CONTACT SAMPLE PHONE ( ) SAMPLE  
 ADDRESS SAMPLE  
 CONTACT IN CASE OF DEATH SAMPLE PHONE ( ) SAMPLE  
 ADDRESS SAMPLE

DO YOU INTEND TO USE:  WATERBED  AQUARIUM  MUSICAL INSTRUMENT SAMPLE  
 HAVE YOU BEEN EVICTED WITHIN THE LAST 5 YEARS OR IS THERE A PENDING EVICTION CASE AGAINST YOU?  YES  NO  
 IF YES, PLEASE LIST COUNTY & STATE SAMPLE  
 HAVE YOU EVER FILED FOR BANKRUPTCY, OR ARE YOU CURRENTLY IN THE BANKRUPTCY PROCESS?  YES  NO IF YES, DATE SAMPLE  
 HAVE YOU EVER HAD A HOME FORECLOSED ON, OR ARE YOU CURRENTLY IN THE FORECLOSURE PROCESS?  YES  NO IF YES, DATE SAMPLE  
**HAVE YOU OR ANY OTHER PERSON WHO WILL BE OCCUPYING THE UNIT EVER BEEN CONVICTED OF, OR PLED GUILTY OR NO CONTEST TO, ANY FELONY OR MISDEMEANOR RELATED TO THE CRIMINAL CONVICTION CRITERIA?**  YES  NO IF YES, WHO SAMPLE  
 COUNTY & STATE SAMPLE WHEN SAMPLE WHAT SAMPLE  
 HAVE YOU OR ANY OTHER PERSON WHO WILL BE OCCUPYING THE UNIT BEEN ARRESTED FOR A CHARGE RELATED TO THE CRIMINAL CONVICTION CRITERIA THAT HAS NOT BEEN DISMISSED?  YES  NO IF YES, COUNTY & STATE SAMPLE  
 WHY ARE YOU VACATING YOUR PRESENT PLACE OF RESIDENCE? SAMPLE  
 HOW DID YOU HEAR ABOUT OUR PROPERTY? SAMPLE

Owner/Agent has charged a screening charge as set forth above. Owner/Agent may obtain a consumer credit report and/or an Investigative Consumer Report which may include the checking of the applicant's credit, income, employment, rental history, and criminal court records and may include information as to his/her character, general reputation, personal characteristics, and mode of living. You have the right to request additional disclosures provided under Section 606 (b) of the Fair Credit Reporting Act, and a written summary of your rights pursuant to Section 609(c). You have the right to dispute the accuracy of the information provided to the Owner/Agent by the screening company or the credit reporting agency as well as complete and accurate disclosure of the nature and scope of the investigation.

**SCREENING COMPANY OR CREDIT REPORTING AGENCY**  
 COMPANY NAME SAMPLE PHONE SAMPLE  
 ADDRESS SAMPLE  
 EMAIL SAMPLE

If the application is approved, applicant will have SAMPLE hours from the time of notification to either, at Owner/Agent's option, execute a rental agreement and make all deposits required thereunder or make a deposit to hold the unit and execute an agreement to execute a rental agreement which will provide for the forfeiture of the deposit if applicant fails to occupy the unit. If applicant fails to timely take the steps required above, he/she will be deemed to have refused the unit and the next application for the unit will be processed.

**THE FOLLOWING INFORMATION IS SUBJECT TO CHANGE PRIOR TO EXECUTION OF RENTAL AGREEMENT.**

RENT	THE FOLLOWING ARE MAXIMUM AMOUNTS. THE ACTUAL AMOUNT CHARGED WILL DEPEND ON UNIT SIZE, SCREENING RESULTS, AND OTHER FACTORS.	SECURITY DEP. MINIMUM	\$	<u>SAMPLE</u>	GOOD FAITH ESTIMATE	Approximate number of units currently available, or which will in the foreseeable future be available, of the size and in the area requested by applicant: <u>SAMPLE</u> unit(s).
		SECURITY DEP. MAXIMUM	\$	<u>SAMPLE</u>		Approximate number of applications previously accepted and currently under consideration for those units: <u>SAMPLE</u> application(s).
	MAXIMUM POTENTIAL RENT	\$	<u>SAMPLE</u>			If the blanks above are not filled in, then there is at least one unit available and there are no applications ahead of yours currently under consideration.
	<u>SAMPLE</u>	\$	<u>SAMPLE</u>			
	<u>SAMPLE</u>	\$	<u>SAMPLE</u>			
	<u>SAMPLE</u>	\$	<u>SAMPLE</u>			
<u>SAMPLE</u>	\$	<u>SAMPLE</u>				

I certify that the above information is correct and complete and hereby authorize you to do a credit check and make any inquiries you feel necessary to evaluate my tenancy and credit standing. I understand that giving incomplete or false information is grounds for rejection of this application. I understand that if any information supplied on this application is later found to be false, this is grounds for termination of tenancy. I have received and read the Owner/Agent's rental criteria and I understand that failure to meet any of the criteria may result in denial of my application.

APPLICANT  SAMPLE DATE SAMPLE  PHOTO I.D. VERIFIED BY SAMPLE  
MM/DD/YYYY (INITIALS)  
 OWNER/AGENT  SAMPLE DATE RECEIVED SAMPLE TIME RECEIVED SAMPLE  
MM/DD/YYYY  
 OWNER/AGENT NOTES SAMPLE

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# OREGON TAX CREDIT

## RENTAL CRITERIA FOR RESIDENCY

(Applicable only if Owner/Agent does not have custom criteria.)

### OCCUPANCY POLICY

1. Occupancy is based on the number of bedrooms in a unit. (A bedroom is defined as a habitable room that is intended to be used primarily for sleeping purposes, contains at least 70 square feet and is configured so as to take the need for a fire exit into account.)
2. The general rule is two persons are allowed per bedroom. Owner/Agent may adopt a more liberal occupancy standard based on factors such as size and configuration of the unit, size and configuration of the bedrooms, and whether any occupants will be infants.
3. A minimum of one person per bedroom may be required under applicable regulations.

### GENERAL STATEMENTS

1. Current, positive, government-issued photo identification that allows Owner/Agent to adequately screen for criminal and or credit history will be required.
2. Each applicant will be required to qualify individually or as per specific criteria areas.
3. Inaccurate, incomplete or falsified information will be grounds for denial of the application.
4. Any applicant currently using illegal drugs will be denied. If approved for tenancy and later illegal drug use is confirmed, termination shall result.
5. Any individual whose tenancy may constitute a direct threat to the health and safety of any individual, the premises, or the property of others, will be denied tenancy.
6. Per HUD & IRS Section 42 regulations, with limited exceptions, households which are comprised entirely of full time students may not be eligible for housing. *NOTE: If, after taking occupancy, the household becomes comprised entirely of full-time students and does not meet any of the exceptions, that household will no longer qualify and will be required to vacate the premises.*

### INCOME CRITERIA

1. **Monthly household income should be at least <sup>SAMPLE</sup>(if blank, 1½) times the monthly stated rent\*** and cannot exceed the applicable maximum income limit assigned to the unit. The income limits are a percentage of the area median income, published annually by HUD, and adjusted for household size. Exceptions will be made to income/rent ratios for those with a minimum of six months of documented, guaranteed rental assistance and/or for those with verified assets on hand sufficient to pay rent and utilities for a minimum of six months.  
\*If applicant will be using local, state or federal housing assistance as a source of income, "monthly stated rent" as used in this section means that portion of the rent that will be payable by applicant and excludes any portion of the rent that will be paid through the assistance program.
2. Monthly income must be from a verifiable, legal source.
3. Minimum monthly income will be consistent with project guidelines.
4. Income and assets of all household members will be verified per methods approved by IRS Section 42 regulations. Verification requests will be mailed, e-mailed, or faxed by management, directly to the verifying institution/agency or employer and not hand-carried by applicant.

### RENTAL HISTORY CRITERIA

1. Twelve months of verifiable contractual rental history from a current unrelated, third party landlord, or home ownership, is required. Less than twelve months verifiable rental history will require an additional security deposit or acceptable co-signer.
2. Three or more notices for nonpayment of rent within one year will result in denial of the application.
3. Three or more dishonored checks within one year will result in denial of the application.
4. Rental history reflecting any past due and unpaid balances to a landlord will result in denial of the application except for unpaid rent, including rent reflected in judgments or referrals of debt to a collection agency, that accrued on or after April 1, 2020, and before March 1, 2022.
5. Rental history including three or more noise disturbances or any other material non-compliance with the rental agreement or rules within the past two years will result in denial.

### EVICITION HISTORY CRITERIA

Five years of eviction-free history is required except for general eviction judgments entered on claims that arose on or after April 1, 2020, and before March 1, 2022. Eviction actions that were dismissed or resulted in a judgment for the applicant will not be considered.

### CREDIT CRITERIA

1. Negative or adverse debt showing on consumer credit report will require additional security deposits or acceptable co-signers.
2. Ten or more unpaid collections (not related to medical expenses) will result in denial of the application.

### CRIMINAL CONVICTION CRITERIA

Upon receipt of the Rental Application and screening fee, Owner/Agent will conduct a search of public records to determine whether applicant or any proposed resident or occupant has a "Conviction" (which means: charges pending as of the date of the application; a conviction; a guilty plea; or no contest plea), for any of the following crimes as provided in ORS 90.303(3): drug-related crime; person crime; sex offense; crime involving financial fraud, including identity theft and forgery; or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of residents, the landlord or the landlord's agent. Owner/Agent will not consider a previous arrest that did not result in a Conviction or expunged records.

If applicant, or any proposed occupant, has a Conviction in their past which would disqualify them under these criminal conviction criteria, and desires to submit additional information to Owner/Agent along with the application so Owner/Agent can engage in an individualized assessment (described below) upon receipt of the results of the public records search and prior to a denial, applicant should do so. Otherwise, applicant may request the review process after denial as set forth below, however, see item (c) under "Criminal Conviction Review Process" below regarding holding the unit.

A single Conviction for any of the following, subject to the results of any review process, shall be grounds for denial of the Rental Application.

- a) Felonies involving: murder, manslaughter, arson, rape, kidnapping, child sex crimes, or manufacturing or distribution of a controlled substance.
- b) Felonies not listed above involving: drug-related crime; person crime; sex offense; crime involving financial fraud, including identity theft and forgery; or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of the residents, the landlord or the landlord's agent, where the date of disposition has occurred in the last 7 years.
- c) Misdemeanors involving: drug related crimes, person crimes, sex offenses, domestic violence, violation of a restraining order, stalking, weapons, criminal impersonation, possession of burglary tools, financial fraud crimes, where the date of disposition has occurred in the last 5 years.
- d) Misdemeanors not listed above involving: theft, criminal trespass, criminal mischief, property crimes or any other crime if the conduct for which applicant was convicted or is charged is of a nature that would adversely affect property of the landlord or a tenant or the health, safety or right of peaceful enjoyment of the premises of the residents, the landlord or the landlord's agent, where the date of disposition has occurred in the last 3 years.
- e) Conviction of any crime that requires lifetime registration as a sex offender, or for which applicant is currently registered as a sex offender, will result in denial.

### Criminal Conviction Review Process.

Owner/Agent will engage in an individualized assessment of the applicant's, or other proposed occupant's, Convictions if applicant has satisfied all other criteria (the denial was based solely on one or more Convictions) and:

- (1) Applicant has submitted supporting documentation prior to the public records search; or
- (2) Applicant is denied based on failure to satisfy these criminal criteria and has submitted a written request along with supporting documentation. Supporting documentation may include:
  - i) Letter from parole or probation office;
  - ii) Letter from caseworker, therapist, counselor, etc.;
  - iii) Certifications of treatments/rehab programs;
  - iv) Letter from employer, teacher, etc.
  - v) Certification of trainings completed;
  - vi) Proof of employment; and
  - vii) Statement of the applicant.

Owner/Agent will:

- (a) Consider relevant individualized evidence of mitigating factors, which may include: the facts or circumstances surrounding the criminal conduct; the age of the convicted person at the time of the conduct; time since the criminal conduct; time since release from incarceration or completion of parole; evidence that the individual has maintained a good tenant history before and/or after the conviction or conduct; and evidence of rehabilitation efforts. Owner/Agent may request additional information and may consider whether there have been multiple Convictions as part of this process.
- (b) Notify applicant of the results of Owner/Agent's review within a reasonable time after receipt of all required information.
- (c) Hold the unit for which the application was received for a reasonable time under all the circumstances to complete the review unless prior to receipt of applicant's written request (if made after denial) the unit was committed to another applicant.