



**Application for Financial Assistance from the
 REALTOR® Assoc. of Greater Fort Myers & the Beach, Inc.
 Housing Foundation
 2840 Winkler Ave. • Fort Myers, FL 33916
 (p) 239/936-3537 • (f) 239/936-2836**

Applicant Information

Applicant's Name		SS#
Co-Applicant's Name		SS#
Occupation		Email
Address		#Years
City	State	ZIP
Home Phone	Work Phone	Cell Phone

Declaration (Circle One)

Applicant Co-Applicant

Have you been declared bankrupt within the past 7 years? Yes No Yes No

Are you a party in a lawsuit? Yes No Yes No

Have you disposed of any major assets (more than \$2,000) in the past two years? Yes No Yes No
 If so, what was the value \$ _____.

Have you ever been awarded child support for any of your children? (Regardless of whether or not it is received) Yes No Yes No

If yes, in what State or County was it awarded _____

Applicant's Employment

Employer	Phone	Fax
Address	Years Employed	
Position	Supervisor	
Previous Employer		
Address	Phone	Fax
Position	Supervisor	

Co-Applicant's Employment

Employer	Phone	Fax
Address	Years Employed	
Position	Supervisor	
Previous Employer		
Address	Phone	Fax
Position	Supervisor	

Household Information

Name (s)	Social Security #	Date of Birth	Sex M, F	Relationship to Applicant	Marital Status M, S, W, D

Is applicant, co-applicant or any other household member over the age of 18 a full time student? Yes No

Annual Household Income? \$ _____

Household Type: Single Two-Parent Single-Parent

Home Purchase Information

Do you currently have a contract on a house? Yes No

If yes, what is the contract closing date? _____

Is the house located in Southwest Florida? Yes No

Have you completed the required Homeowner Education (HOT) Class? If not, what date are you going to take the HOT class? _____ Yes No

How did you hear about the REALTOR® Association Housing Foundation?

REALTOR® Lender Other _____

Lender Information

Company Name		
Agent Name		
Office Address		Email
City	State	ZIP
Home Phone	Work Phone	Cell Phone
Are you currently pre-approved for a mortgage loan?		Yes <input type="checkbox"/> No <input type="checkbox"/>
If yes, amount \$ _____		If no, why? _____
Type of loan (Check all that apply): <input type="checkbox"/> FHA <input type="checkbox"/> VA <input type="checkbox"/> USDA		
<input type="checkbox"/> Fixed Rate <input type="checkbox"/> ARM <input type="checkbox"/> Balloon <input type="checkbox"/> Other _____		

REALTOR® Information

Are you currently working with a REALTOR®?		Yes <input type="checkbox"/> No <input type="checkbox"/>
REALTOR® Name	Company Name	
Office Address		Email
City	State	Zip
Home Phone	Work Phone	Cell Phone

The following section is to be completed by the REALTOR®:

Is the buyer related to any parties in this transaction? Yes No

If yes, is any portion of the real estate commission being rebated back to the buyer? If so, how much? _____ Yes No

Is your client eligible for FLHOP, SHIP or any other subsidies? Yes No

If yes, has your client applied for these subsidies? Yes No

If not, why? _____

Please initial by each statement below and sign, print name and date were required.

_____ Applicant has not been **required** to use the services of any real estate broker or agent, REALTOR® lender, mortgage broker or banker, escrow agent, title insurance company, inspector, or service provider in order to qualify for assistance from the Foundation.

_____ Applicant has not been directed or steered toward any real properties by the Foundation for purposes of purchase or otherwise.

_____ Applicant shall use the funds received from the Foundation solely for the purpose of acquiring a Residence located entirely within Southwest Florida in the State of Florida.

_____ I, _____ grant permission to the REALTOR® Association of Greater Fort Myers and the Beach, Inc. to publicize my name and photography for purposes of promoting the Housing Foundation of the REALTOR® Association of Greater Fort Myers & the Beach, Inc.

By signing below I, _____ confirm that each, every and all
Applicant's name (please print)
items of information, statements and representations made by me in my request for assistance including, but not limited to all items accompanying this application, are true and correct as of the date the application was submitted to the Foundation, and remain true and correct without modification as of the date of approval of application.

Applicant's signature _____ Date _____

Co- Applicant's signature _____ Date _____

Nominating Organization _____ Date Submitted _____

This section for office use only:

Date appl. received: _____ Date of review: _____ Appl. reviewed by _____

Approved: Yes No Approved By _____ Check issue date _____

Validation Signature: _____

Print name

Signature

Must be validated by Board/Assoc. President, Officer or AE.

REQUIRED DOCUMENTATION – PLEASE KEEP A COPY FOR YOUR REFERENCE

- Proof of employment
- Copy of 2 years' tax returns
- Copy of two most recent pay stubs
- Pre-approved letter from lender (applicants must be qualified through date of closing)
- Copy of loan application
- Copy of purchase contract
- Copy of GFE
- Copy of three most recent bank statements (all pages)

The following are the qualifications for applicants:

- Applicant cannot own any other homes and agrees to occupy the property as the principal homesteaded residence.
- Applicant must have an accepted purchase contract on an existing single family home in an unincorporated area of Southwest Florida for foundation monies to be disbursed at closing.
- Applicant must have a gross annual household income which does not exceed the limits set forth by HUD/SHIP (see income range). Note: The maximum price of a new or existing house is \$312,276.
- Applicant must attend 8-hour Homebuyer Education provided by a HUD-certified agency. Note: This class is offered at the REALTOR® Association Education Center one Saturday a month.

Applications will be ranked based on several factors: pre-approval for a loan; household income within income levels to qualify for financial assistance; completion of 8-hour Homebuyer Education and demonstrated need for financial assistance. Our non-profit partner(s) will review applications, determine the applicant's ranking and make a recommendation to the Housing Foundation's Board of Directors for loan approval.