



Safe Homes

For O.C. Seniors



Grant Application

For eligible senior homeowners residing in participating Urban County cities and eligible unincorporated areas of Orange County.

Section 1 - Household Information

Applicant's Name: _____ Age: _____ Sex: _____

Co-Applicant's Name: _____ Age: _____ Sex: _____

Address: _____

Email Address: _____

Phone (home): _____ (cell) _____

If we are unable to contact you, please list another contact:

Name _____ (cell) _____ Email: _____

Section 2 - Household Composition

Total number of people in household: _____ How many are disabled? _____

Is anyone living here other than the Applicant/Co-Applicant? ☐ Yes ☐ No

Head of Household is: ☐ Male ☐ Female

DEMOGRAPHICS

Do you consider your household Hispanic/Latino? ☐ Yes ☐ No

How do you identify? Please check all that apply:

- | | |
|---|---|
| ☐ White | ☐ Black or African American |
| ☐ Asian | ☐ American Indian or Alaska Native |
| ☐ Native Hawaiian or Other Pacific Islander | ☐ American Indian or Alaska Native & White |
| ☐ Asian & White | ☐ Black or African American & White |
| ☐ American Indian/Alaska Native & Black/African American | |
| ☐ Other _____ | |

Section 3 - Income Information

The income amounts reported below should represent the combined monthly income from all household members. Please provide supporting documentation for each income source and each household member.

Examples of Income	Name of Income Source	Gross Monthly Amount
Employment / Wages		
Self-Employment / Rental		
Social Security / SSI / SSDI		
Pension / Retirement / Annuity		
Disability / Unemployment		
Public Assistance		
Other (gifts, alimony, etc)		
	Total Monthly Income	
	Total Annual Income (x12)	

Need help understanding what counts as income or how to calculate it? See **Appendix A** at the end of this application.

Section 4 - Assets

List all household assets and attach recent statements. For each asset, provide the institution name, last four digits of the account number, and current value.

Assets	Cash Value	Bank Name	Account # (Last 4 Digits)
Checking Account	\$		
	\$		
Savings	\$		
	\$		
Credit Union	\$		
Stocks/Bonds	\$		
401K/Retirement	\$		
Life Insurance	\$		
Other Property Ownership Equity	\$		
	\$		
		Total Household Asset Value	
		2% of Total Asset Value (multiply Total Asset Value by .02)	

Need help understanding what counts as an asset? See **Appendix A** at the end of this application.

Total Household Income	
Total Annual Income from Section 3	
2% of Total Assets Value from Section 4	
GRAND TOTAL HOUSEHOLD INCOME	

Maximum Income Allowed (80% Area Median Income - 2026 HUD Limits)	
1 Person Household	\$104,200
2 Person Household	\$119,100

Section 5 - Required Documentation

Please include all supporting documents for the Income and Asset declarations above. (Please feel free to cross out your social security numbers and all BUT the last 4 digits of your account numbers.) Below is a checklist of requirements as applicable.

- ☐ Copy of your most recent Federal Tax Returns, signed, including all schedules but not worksheets (or 3 years if self-employed).
- ☐ Copy of your last 2 paycheck stubs showing year-to-date income totals or current Profit and Loss Statement if self employed. If you are not working, provide a statement indicating the nature and anticipated duration
- ☐ Copy of your Annual Social Security Award Letter or other benefit statements.
- ☐ All pages of banking statements (2 months, checking & savings)
- ☐ Investment/retirement statements (stocks, bonds, etc if applicable)
- ☐ Other: Any documents to support stated income and investments
- ☐ Proof of property ownership (Grant Deed, Title, or Mortgage Statement)

Section 6 - Other Assistance Received

Have you received or been approved for any insurance proceeds, FEMA assistance, SBA assistance, grant funds, charitable assistance, or other financial assistance for the repairs or improvements requested in this application?

- ☐ No
- ☐ Yes

If yes, please describe the assistance received and the amount.

Section 7 - Applicant Certification

I/We hereby authorize the County of Orange and/or CivicStone, Inc. to obtain any information for verification purposes including; Checking and Savings Accounts, Mortgage Information, and any other information deemed necessary in connection with my request for financial assistance. This information is for confidential use to determine eligibility for the Safe Homes for O.C. Seniors program. A photographic copy of this authorization of the undersigned signature(s) may be deemed to be equivalent to the original and may be used as a duplicated original.

PENALTY FOR FALSE OR FRAUDULENT STATEMENT U.S.C. TITLE 18 SECTION 1001, PROVIDES: "WHOEVER, IN ANY MATTER WITHIN THE JURISDICTION OF ANY DEPARTMENT OR AGENCY OF THE UNITED STATES KNOWINGLY AND WILLFULLY FALSIFIES ... OR MAKE ANY FALSE, FICTITIOUS OR FRAUDULENT STATEMENT OR ENTRY, SHALL BE FINED UP TO \$10,000, OR IMPRISONED UP TO 5 YEARS OR BOTH."

I DECLARE UNDER PENALTY OF PERJURY THAT THE ABOVE STATEMENT IS TRUE AND CORRECT.

Signature of Applicant: _____ Date: _____

Signature of Co-Applicant: _____ Date: _____

Household Member: _____ Date: _____

Household Member: _____ Date: _____

Mail or Deliver Your Application To:

County of Orange

c/o CivicStone, Inc.

4195 Chino Hills Parkway #267

Chino Hills, CA 91709

Phone: (909) 364-9000 | Fax: (909) 333-4030

Email: monique@civicstone.com

FOR OFFICE USE ONLY

Reviewed By: _____ Date: _____

☐ Approved ☐ Denied - Reason _____

Appendix A: Clarifying Income & Asset Information

What Counts as Income? Include all income sources for both the applicant and co-applicant. These should reflect the gross monthly amounts received by each household member. Examples include:

- Wages from employment – Include gross earnings before taxes. Also include any regular pay, special pay, or allowances received by a member of the Armed Forces.
- Self-employment or rental income – If you or your co-applicant operate a business, work independently, or earn income from rental of property (real or personal), report the net monthly income after expenses.
- Social Security benefits – Include the gross amount (before deductions for Medicare) received monthly through Social Security Retirement, SSI, or SSDI.
- Pensions, annuities, or retirement distributions – Include any regular monthly payments received from pensions, annuities, IRAs, or retirement accounts, as well as insurance payments or death benefits.
- Unemployment, disability, or worker's compensation – Report the gross monthly amount received from any of these sources.
- Public assistance – Include monthly cash assistance and other recurring public benefits. Do not include CalFresh (food assistance) benefits.
- Other income – Include regular contributions from others outside your household, such as gifts, alimony, or child support.

What Counts as Assets? Include the current value of all assets held by any household member. This includes but is not limited to:

- Checking and savings accounts
- Money Market Accounts
- Certificates of deposit (CDs)
- Investment accounts (stocks, bonds, mutual funds, etc.)
- Cryptocurrency wallets or digital assets

- Trust funds (if accessible)
- Cash value of life insurance policies
- Equity in any property you own, other than your primary residence.
- Retirement accounts (IRA, 401(k), etc.)

How HUD Treats Assets: HUD does *not* count the total value of your assets as income. Instead, it assumes your assets earn approximately 2% annually. For example:

- \$50,000 in total assets = \$1,000 in additional calculated income
- \$100,000 in total assets = \$2,000 in calculated income

Only the **interest or imputed income** from these assets is included in your income total.

- **Note:** If you are unsure whether something counts, include it and we will help you determine eligibility.