

SECURITY BENEFIT FUND APPLICATION
FOR ACQUISITION OR RETENTION OF A RESIDENCE OR RENTAL UNIT
(ACTIVE & "RETURN TO WORK" MEMBERS ONLY)

- All information on this application must be completed.
- Please read the back of this form and have all required documentation attached to this application.
- This benefit is available only if there is a financial need to pay for the expenses in connection with the acquisition or retention of a primary residence or rental unit. In the case of an acquisition of a residence or rental unit, you must apply for and receive this benefit prior to the closing or rental agreement date.
- Your primary residence must be located within a 150 miles radius from the address of the Fund Office.
- This benefit is subject to all Federal, State, City and FICA taxes and will be reported on Form W-2 at year end.
- If you wish to adjust your tax withholding, please complete forms W-4 (Employee's Withholding Certificate) and IT-2104 (New York State Employee's Withholding Certificate). Once the tax forms are received, we will use your withholding elections for all taxable disbursements from the Security Benefit Fund.

Book Number _____

Name _____

Home phone

Mobile

E-mail

Type of benefit requested (Check One) Amount Requested \$ _____

☐ Purchase of Primary Residence
(please complete reverse side)

☐ Initial Rental Costs
(please complete reverse side)

☐ Eviction/Foreclosure
(must be at least 3 months behind)

SIGNATURE _____ **DATE** _____

A) PURCHASE OF PRIMARY RESIDENCE / INITIAL RENTAL COSTS

Costs or fees related to the purchase of a primary residence eligible for this benefit include, but are not limited to the following: loan originations, loan discounts, appraisals, credit reports, lender's inspections, mortgage insurance applications, tax services, flood checks, document preparations, title searches, title examinations, attorney fees, title insurance, governmental recordings, state taxes and surveys.

If for any reason the purchase of the residence is not executed after you receive the funds from this benefit you must notify the Fund Office immediately and return the funds which were disbursed. If not, this claim will be deemed fraudulent and your account will be subject to the Security Benefit Fund's fraud and suspension rules.

The initial rental costs related to a rental may include the first and last month's rent, security deposit, if any, and broker's fees or commissions. You may only utilize the initial rental cost benefit once during a calendar year.

REQUIRED DOCUMENTATION

- (a) Signed Contract to purchase primary residence
- (b) Mortgage Application subject to approval and good faith estimate
- (c) Legal Documentation of all costs of primary residence
- (d) Copy of Rental Lease/Landlord Agreement with future termination date
- (e) Notarized statement affirming residence will be your primary residence (See Below)
- (f) Your primary residence must be located within 150 miles radius from the address of the Fund Office.

AFFIDAVIT FOR PURCHASE OR RENTAL OF PRIMARY RESIDENCE (House or Apartment)

State of New York)

County of) :

[Please Print Name] _____, being duly sworn, depose and states that this application refers to the purchase or rental of my primary residence which is at the following address:

Address

City

State

Zip

Sworn to before me this ____ day

of _____, 20____

(Signature of Participant)

Notary Public

Date

B) PREVENTION OF EVICTION FROM OR FORECLOSURE ON A PRIMARY RESIDENCE

REQUIRED DOCUMENTATION

- (a) Court Eviction Notice/Bank Financial Institution foreclosure notice
- (b) Evidence of residence at subject premises (e.g. driver's license or utility bill)
- (c) Proof of current rent (lease agreement) or mortgage payment (current mortgage statement)

You may only utilize the prevention of an Eviction or Foreclosure of a primary residence benefit twice per calendar year.