



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

- This benefit is available only if there is a financial need to pay for the ancillary expenses in connection with the acquisition or retention of a 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.
- All information on this application must be completed.
- Your primary residence must be located within 150 miles distance from the address of the Fund Office.
- Checks will be mailed to the address the Fund Office has on file for you. If you wish to change your address please call the Fund Office for the necessary *Change of Address* form.
- Please read the back of this form and have all required documentation attached with this application.
- Please note that monies withdrawn from the plan for this benefit are subject to all withholding and FICA taxes.

Book Number \_\_\_\_\_

Name \_\_\_\_\_

Home Telephone \_\_\_\_\_

Mobile \_\_\_\_\_

E-mail \_\_\_\_\_

Single  or Married  or Married, but withhold at higher single rate

Number of allowances you are claiming \_\_\_\_\_

Additional amount, if any, you want withheld \$ \_\_\_\_\_

New York City Resident: Yes  or No

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

- Purchase of Primary Residence       Initial Rental Costs       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, deposit, if any, and broker's fees or commissions. You may only utilize the initial rental cost benefit twice during twelve-month period.

### 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 term date
- (e) Notarized statement affirming residence will be your primary residence (See Below)

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

State of New York        )  
                                  )  
County of                ) :

[Please Print Name] \_\_\_\_\_, being duly sworn, deposed 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.