



Assistive Technology Financing Loan Program

LOAN APPLICATION PACKAGE

Please take a moment to review these instructions for completing this application.

To ensure that your loan will be processed in a timely manner, be sure to submit **all the required documentation** listed below. **Note: Additional documentation may be required.**

If a question is not applicable (**N/A**), draw a line through it or write “N/A” next to the question. This will indicate you have read the question and did not inadvertently skip the question.

- ✓ **Complete** all applicable sections of the **LOAN APPLICATION**.
- ✓ Bring, mail, email or fax **an official quote from your vendor**, providing a breakdown of costs and vendor’s address and phone number.
- ✓ Bring, mail, email, or fax **Proof of Income**—examples of income include:
 - Two current paystubs or statements from your Employer
 - IRS Tax Return for the past two years (if self-employed)
 - Supplemental Security Income (SSI) Award Letter
 - Social Security Disability (SSDI) Award Letter
 - Child Support/Alimony: You are not required to disclose income from alimony, child support, or separate maintenance payments **unless** you are using this as a basis for repayment
 - Co-applicant’s proof of income (*if applicable*)
 - **Money order in the amount of \$23.00 for your credit report**
 - **Quote from the Vendor**

Bring, mail, email, or fax **two forms of identification**; must include at least one picture ID.

- Driver’s License with current address (Picture ID)

- Non-driver's identification with current address (Picture ID)
- Passport (Picture ID)
- Utility bill with current address
- Medical card
- Social Security Card

✓ Review the attached "**Privacy Rights Notice,**" and initial on Page 8 that you received the notice.

If approved, the loan check will be made out to the borrower & retailer/vendor. The borrower endorses the check, gives it to the retailer/vendor, who will deposit the check.

Check Appropriate Box:

- You are applying for individual credit in your own name and are relying on your own income or assets for repayment of the credit requested.
- You are applying for joint credit with another person.

Diagnosis of Disability/Disabilities: _____

Loan Amount Requested: \$ _____

Type of Assistive Technology Device/Service Requested _____

Note: DC FUND\$ does NOT reimburse for items previously purchased

The application and supporting documents can be dropped-off, mailed, emailed, or faxed to:

Alicia Johns
 220 I Street NE Suite 130
 Washington, DC 20002
 Phone: 202-547-0198 Ext 134
 Fax: 202-547-2662
ajohns@uls-dc.org

This form can also be downloaded from the Assistive Technology Program [website](#).

SECTION A – APPLICANT INFORMATION

Full Name: _____ Date of Birth: ____/____/____

Marital Status: Married: _____ Divorced: _____ Unmarried (including single, widowed):

Current Street Address: _____ Ward: _____

City: _____ State: _____ Zip: _____ County _____

How Long at This Address: _____ Telephone
Number _____?

Email Address: _____ Cell Phone Number:

Social Security Number _____

Number of People in Your Household (Related & Unrelated): _____

Driver's License or State ID No.: _____ Issue Date: ____/____/____ Exp.Date:
____/____/____

What is Your Country of Citizenship? _____

Immigration Status: _____ U.S. Citizen _____ Permanent Resident of U.S. _____ Other

Previous Street Address (if less than two years): _____

City: _____ State: _____ Zip: _____

Current Employer: _____ Work Number: _____

Position or Title: _____ Years/Months Employed: _____

Employer's Address: _____

Previous Employer (if less than two years): _____

Previous Employer's Address: _____

Name of Nearest Relative or Other Party Not Living with You:

Name: _____ Relationship _____

Address: _____

Telephone Number: _____

SECTION B – CO-APPLICANT INFORMATION (IF APPLICABLE)

Full Name: _____ Date of Birth: ____/____/____

Marital Status: Married _____ Divorced _____ Unmarried (including single, widowed) _____

Current Street Address: _____

City: _____ State: _____ Zip: _____

Phone Number _____ Email Address: _____

How Long at this Address: _____ Social Security Number: _____

Driver's License or State ID #: _____ Issue Date: ____/____/____ Exp. Date: ____/____/____

What is Your Country of Citizenship? _____

Immigration Status: _____ U.S. Citizen _____ Permanent Resident of US: _____ Other _____

Previous Street Address (if less than 2 years): _____

City: _____ State: _____ Zip: _____

Current Employer: _____ Work Number: _____

Position or Title: _____ Years / Months Employed: ____/____

Employer's Address: _____

Previous Employer (if less than two years): _____

Previous Employer's Address: _____

Name of nearest relative not living with co-applicant:

Name: _____ Relationship _____

Address: _____

Telephone Number: _____

SECTION C - APPLICANT INCOME, EXPENSE, ASSET & DEBT INFORMATION

Please complete separate income and expense information for each applicant and co-applicant.

Alimony, child support or separate maintenance income need not be revealed if you do not wish to have it considered as a basis for paying this obligation.

Estimated **Monthly** Income. Please include all current sources of **monthly** income.

NET (Take home) Earned Income
(Wages, Salary, Self- Employment) \$ _____

Social Security Retirement (SSA) \$ _____

Supplemental Security Income (SSI) \$ _____

Social Security Disability Insurance (SSDI) \$ _____

Pension, Retirement Income \$ _____

Child Support and/or Alimony \$ _____

General Assistance (i.e., money from family members to assist with payment of monthly bills) \$ _____

Other Income (describe) _____ \$ _____

Total Monthly Income \$ _____

Gross Income \$ _____ Week: _____ Month: _____ Year: _____ Income Source: _____

Do you have a checking account? Yes _____ No _____

Do you have a savings account? Yes _____ No _____

ASSETS (Optional): Cash in Banks \$ _____ Stocks/Bonds \$ _____ Retirement Accounts \$ _____

CO-APPLICANT INCOME (If Applicable)

Gross Income \$ _____ Week _____ Month _____ Year _____ Income Source _____

Do you have a checking account? Yes _____ No _____

Do you have a savings account? Yes _____ No _____

ASSETS (Optional): Cash in Banks \$ _____ Stocks/Bonds \$ _____ Retirement Accounts \$ _____

APPLICANT EXPENSES AND DEBT STATEMENT

Please complete Estimated Average Monthly Expense Form Below and include all financial obligations and balances on any loans and credit cards.

Actual/Estimated Average Monthly Expenses & Debt

<u>Residence:</u>	Monthly Payment
Rent or House Mortgage Payment	
Homeowners or Renters Insurance (if paid separately)	
Utilities (water, sewer, garbage, electric, gas)	
Total Monthly Phone Bills (Home and Cell)	
Property Taxes (if paid separately from house payment)	
Total Residence	

<u>Transportation:</u>	Monthly Payment
Auto Loan	
Auto Insurance	
Gas (consider the high cost of gasoline)	
Vehicle Repairs, etc.	
Other Transportation Costs (taxi, bus, driver, etc.)	
Total Transportation	

<u>Medical/Insurance:</u>	
Health & Dental Insurance	
Medical/Dental Expenses Not Paid by Other Source (co-pays)	
Prescriptions	
Glasses/Contacts/Medical Equipment and Supplies	
Life Insurance	
Total Insurance/Medical	

<u>Essentials:</u>	
Groceries	
Clothing & Cleaning	
Household and Yard Items/Services	
Total Essentials	

Entertainment:

Eating Out	
Cable TV/Satellite/Internet	
Movies/Theater/Cigarettes/Alcohol	
Hobbies (sports, pets, arts & crafts, etc.)	
Total Entertainment	
Other Monthly Expenses including Child Support/Alimony:	

OUTSTANDING DEBTS (Include installment loans, credit cards, rent, mortgages etc.)
Use separate sheet if necessary.

CREDITOR	Name on Account	Original Debt	Present Balance	Monthly Payment	Past Due? Yes/No
Rent/Mortgage		\$	\$	\$	\$
Credit Cards		\$	\$	\$	\$
Automobile		\$	\$	\$	\$
Auto Insurance		\$	\$	\$	\$
Student Loan (s)		\$	\$	\$	\$
Other		\$	\$	\$	\$
Total Debts		\$	\$	\$	\$
		\$	\$	\$	\$

Total Monthly Obligations \$ _____

Amount left over after all expenses paid \$ _____

Are you a co-applicant on any loan or contract? Yes No
If yes, for whom? _____

Are there any unsatisfied judgments against you? Yes No
If yes, to whom owed? _____ Amount: \$ _____

Have you declared bankruptcy in the last 5 years? Yes No

If yes, what state? _____ Year dismissed: _____

If you answered yes to the question above, please explain what caused you to have bad credit or why you filed for bankruptcy. Have you taken any steps to improve your credit or pay off your debts?



Assistive Technology Financing Loan Program

AUTHORIZATION

I/We understand and agree that the information in this application and otherwise collected by DC FUNDS\$ may, depending upon the amount and type of credit requested, be provided to one or more Lenders (each, a “Lender”) in connection with my/our request for financing.

Certification:

I/We certify that the information provided in this application is true and correct as of the date set forth opposite my/our signature on this application and acknowledge my/our understanding that any intentional or negligent misrepresentation of the information contained in this application may result in civil liability and/or criminal penalties including, but not limited to, fine or imprisonment or both under the provisions of Title 18, United States Code, Section 1001 et seq., and liability for monetary damages to DC FUNDS\$, any other lender, its agents, successors, assigns, insurers, and any other person who may suffer any loss due to reliance upon any misrepresentation I/we made in this application or in any other manner.

Signature of Applicant

Date

Signature of Co-Applicant (if applicable)

Date



PRIVACY NOTICE

Your privacy is important to us, and maintaining your trust and confidence is one of our highest priorities. We respect your right to keep your personal information confidential and understand your desire to avoid unwanted solicitations.

We are happy to provide this privacy policy notice, and we hope you will take a few minutes to read it. You will have a better understanding of what we do with the information you provide us and how we strive to keep it private and secure.

This notice explains how we collect, handle, and disclose personal information about you.

Information We Collect:

We collect nonpublic personal information about you from the following sources:

- Information we receive from you on application and other forms.
- Information about your transactions with us or others; and
- Information we receive from a consumer reporting agency.

Information We May Disclose:

We do not disclose nonpublic personal information about our customers or former customers to anyone, except as permitted by law.

Confidentiality and Security of Nonpublic Personal Information

Confidentiality and security of your nonpublic personal information is of paramount importance to us. We maintain physical, electronic, and procedural safeguards in compliance with all applicable laws and regulations to guard your nonpublic personal information from unauthorized access, alteration, and destruction. We restrict access to your nonpublic personal information to those employees and other parties who must use the information to provide services to you.

Please initial that you received a copy of DC FUNDS\$'s privacy statement. _____



CERTIFICATION

I/We understand that this is a request for funds that I/We will need to repay. I/We authorize the Assistive Technology Financing Loan Program to review all information provided and seek additional information from third parties required to verify the contents of this application. All information is true and correct and is provided to obtain the loan I/We are seeking. Any misrepresentation on any part of this application could result in rejection of this application or termination of the loan.

I/We further understand that issuance of a loan does not imply any type of warranty by DC FUND\$ or any other lender regarding the suitability, condition, merchantability or safety of the device or equipment that I/we purchase with the loan. I/We understand that I/we alone are responsible for selecting the devices or equipment to be financed. Therefore, **I/WE CAN MAKE NO CLAIMS AGAINST DC FUND\$ OR ANY LENDER OR ANY OF THEIR AGENTS, AND I/WE EACH HEREBY RELEASE DC FUND\$ AND ANY OTHER LENDER, AND ALL OF THEIR RESPECTIVE AGENTS, FROM AND AGAINST ALL LIABILITY, FOR DEFECTS IN ANY DEVICE OR EQUIPMENT OR ANY ACCIDENT OR INJURY RESULTING FROM ITS USE.**

I/We hereby also authorize DC FUND\$ and any lender to whom DC FUND\$ may refer this application to disclose to DC FUND\$ any information about any of us that the lender obtains or compiles that may be relevant to decisions DC FUND\$ may make with respect to the application.

Signature of Applicant _____ Date _____

Signature of Co-Applicant (if applicable) _____ Date _____



IMPORTANT INFORMATION ABOUT PROCEDURES FOR OPENING A NEW ACCOUNT

Why are we asking for this information? To help the government fight the funding of terrorism and money laundering activities, Federal law requires all financial institutions to obtain, verify, and record information that identifies each person who opens an account. What this means for you: When you open an account, we will be asked for your name, address, date of birth, and other information that will allow us to identify you. We may also ask to see your driver's license or other identifying documents.

____ Unless checked no applicant(s) with an interest in this account is either:

- (1) A senior military, governmental, or political official in a non-U. S country or
- (2) clearly associated with or an immediate family member of such an official.

If checked, please provide the name of the official, office held, and country:
