



Retirement Trust Foundation Housing Assistance Policy

The Retirement Trust Foundation (RTF) hereby establishes the following Housing Assistance Policy for providing housing subsidies to administrative professionals in need.

To be eligible for housing assistance the applicant must meet each of the following criteria:

1. Must be a current or accepted resident of a retirement community and living independently.
2. Must meet the HUD Public Housing/Section 8 Income Limits for U.S. residents for consideration. Matrix based on Canadian Council on Social Development Poverty Lines will be used for consideration of Canadian residents who apply.
3. Must provide verifiable financial information to the RTF including a completed request for housing assistance form and other supporting documentation as required.
4. Applicant must not have transferred assets to third parties within the past three (3) years, which transfers have caused the applicant to have a need for housing assistance which otherwise would not have occurred.
5. Applicant must be at least age 55.
6. Applicant must apply for housing assistance by November 15th of each calendar year to be considered for the upcoming year. Thereafter, the applicant must reapply each year by the November 15th deadline submitting the request for housing assistance form and supporting documentation.
7. Applications will be reviewed by the Trustees annually at a meeting to take place in the fall prior to the grant year.
8. Final approval for housing assistance is subject to the sole discretion of the Trustees of the Retirement Trust Foundation.

Vista Grande Grant Policy

“Vista Grande applicants will be supported to a maximum of 75% of their monthly rent up to \$600, based on available funds.”

Both policies approved by the Retirement Trust Foundation Trustees, March 20, 2010