

Affidavit

In the matter of the application of

SS# _____

For Supplemental Security Income Benefits

State of _____ :

County of _____ : SS

City of _____ :

I, _____ being duly sworn, deposes and says:

1. I reside at _____.
2. I provide room and lodging for my adult disabled _____, _____
(Relationship) (Name of Disabled Adult)
at the above address each month for a flat fee pursuant to an oral business agreement.
3. I charge _____ \$ _____ per month for room and lodging pursuant to
(Name of Disabled Adult)
that oral agreement.
4. I charge the same amount, \$ _____ per month for any nonrelatives who I took in as a
roomer-lodgers under a similar business arrangement.
5. _____ has no equity of property interest in my home.
(Name of Disabled Adult)
6. _____ does not share in the insurance, maintenance, repair, furnishing,
(Name of Disabled Adult)
decorating, utilities, or any other operational cost of my home.
7. _____ does not participate in any decisions regarding home repairs,
(Name of Disabled Adult)
improvements, or other aspects of daily activities.
8. We do not "pool" our funds for any household expenses.
9. _____ does not contribute to, nor does his name appear on any bill as a
(Name of Disabled Adult)
Responsible party for my actual expenses of operating the house on a per expense or pro-rata
basis because he is a roomer-lodger in my home.

- 10. I understand that it is the policy of the Social Security Administration that when a recipient of Supplemental Security Income benefits (SSI) reside with others, household expenses must be apportioned and that a recipient must pay a pro-rata share of these costs in order to receive the regulated amount of SSI Benefits.
- 11. However, as of _____, following our agreement _____ is now
 (Date Arrangement Began) (Name of disabled adult)
 paying a flat fee of \$_____ a month for room and lodgings. Since I, myself, am not in receipt of any Social Security benefits, I am unwilling to apportion my household expenses according to Social Security policy.
- 12. If _____ is unable to pay the flat fee for rent for his room and lodging,
 (Name of disabled adult)
 I will make him leave.
- 13. I do not contribute in any ways to the needs of _____.
 (Name of disabled adult)

Affiant

Sworn to before me this _____
day of _____, 20____.

Notary Public

Roomer-Lodger Agreements

Different SSI Payment Rates: The SSI program has different monthly benefit rates for different living arrangements. In New York State, SSI payments are usually based on three rates. For 2017, those rates are:

- ◆ Living alone - \$822
- ◆ Living with others and paying fair share of household expenses - \$758
- ◆ Living in the household of another - \$ 513

A person is considered living alone when he or she has set expenses and is independent of anyone else. A person is living with others when they share expenses, such as food, utilities, rent, or mortgage. There is an assumption that people living together share certain costs related to food and shelter.

Persons getting the lowest SSI rate: If a person cannot pay the fair share of household expenses (one-half of expenses in a household of two, one-third of expenses in a household of three, etc.), they cannot be considered "living with others." For example, an SSI recipient whose fair share in a parent's home would be \$1,000 per month could not possibly pay the appropriate share of expenses out of an SSI payment. Unless the SSI recipient can establish a separate living unit, he or she would be considered "living in the household of another" and get paid at the \$513 SSI rate.

An SSI recipient can obtain the "living alone rate" by working out a business relationship under a roomer-lodger agreement:

- ◆ This agreement is based on the idea that the adult with a disability pays a flat fee amount per month for shelter costs to the homeowner or lessee (i.e., the primary tenant who rents from a landlord).
- ◆ The homeowner/lessee could be the parent, another relative (other than spouse), or a friend.
- ◆ The amount paid is what the homeowner/lessee would charge anyone else for the room and lodging being provided. They do not "share" household costs. The roomer/lodger's name does not appear on any of the household bills (e.g., electric or gas).
- ◆ This type of living arrangement is only possible if the homeowner/lessee offers this arrangement to the individual. There may be financial circumstances, such as income tax considerations, when such an agreement may not be in the homeowner/lessee's financial best interest.

An SSI recipient can change living arrangements at any time. If an individual wishes to establish a roomer-lodger status, he or she should submit a statement from the homeowner/lessee to the Social Security Administration indicating how much the SSI recipient is charged as a flat fee per month for room and lodging. The SSI program should accept the agreement and adjust the individual's SSI benefit accordingly. The SSI recipient is then entitled to New York's "living alone" status. The monthly SSI payment would then be based on the \$822 living alone rate (minus any countable income).

Note: This document is produced, printed, and disseminated at U.S. taxpayer expense. One hundred percent of the funding for this document is through a Social Security cooperative agreement that funds our Western NY Work Incentives Planning and Assistance (WIPA) Project. Although Social Security reviewed this document for accuracy, it does not constitute an official Social Security communication.