

**APPLICANT/RESIDENT INFORMATION SHEET  
(Housing Credit Affordable Program Only)**

Property Name:

Phone:

**As applicable to your household**, please bring the following information to your **Interview** to expedite the certification process (Management will make photocopies of “original” documents – we do not keep applicant/resident original documents.)

1. The Name, Address, Telephone and FAX number for all verifying parties/providers for any of the relevant information below.
2. All income sources as relevant for **every** person who will live in the apartment:
  - a. 2 months of most current and **consecutive** pay stubs or a Payroll statement. For new or recent employment, bring any verifications that you have. If current employment is for *less* than 6 months, then bring information regarding the source(s) of your income over the prior 12 months. Current W-2 forms/Tax Return (Federal and State) **if** no other source of income verification is available.
  - b. Self-employment: Schedule C from Tax Return (all pages), Accountant statement, or other proof of income.
  - c. Most current benefit/award letters (all pages) from Unemployment, Social Security, Veteran’s, TANF, Child Support, Alimony, other pensions, Trust accounts, etc. Information regarding family support/cash gifts, etc.
  - d. If **all** members of your household are “full-time students” (includes grades K – 12): Name of school and class schedule. Adult students who receive “Financial Aide” from an institution of higher learning **may** have to include this income per program regulations. The following is a list of income sources that **could** be counted towards the calculation of gross income *minus* tuition costs: ***Work-study; Grants, Scholarships; Fellowships; Internships; Assistantships; Graduate Assistantships; G.I Bill; and, Apprenticeships, etc. (Student Loans are not counted.)***
3. If household total (*combined*) assets from all sources and accounts are valued **at or above \$ 5000** please bring the below information (as relevant) to your Interview:
  - a. **Checking** (all accounts): Six (6) current consecutive bank statements per each account.
  - b. **Savings**: One (1) most current account statement for each savings account.
  - c. **Real estate** (home, mobile home, land, etc.): Information about current market value, loan balances, property tax statements, joint ownership, rental income, etc.
  - d. **Stocks, bonds, investments, 401K, Certificates of Deposit, other retirement accounts**: current account statements, IRS 1099 forms, etc.
  - e. **Any information** regarding any type of interest/dividend income not mentioned above.
  - f. **WHOLE or Universal Life Insurance policies**: Pages showing date of purchase, name of insurer, cash value (amortization schedule from the policy is also accepted.)
4. Personal information needed for **all** household members if not previously provided with the application or previously given to Management:
  - a. All members: Birthdate and Social Security number (if one has been assigned); IRS Work Number and/or Alien Registration Cards, ITIN #, if applicable;
  - b. Picture ID for ALL **adult** members (age 18 and older or emancipated);
  - c. Verification that dependent children will live in the apartment 50% or more of the time.

Please call the Management Office immediately if you have any questions at: \_\_\_\_\_ . We look forward to meeting with you and are pleased that you have chosen our apartment community as your home.