

**APPLICATION/INCOME INTERVIEW  
REQUIRED INFORMATION AND DOCUMENTATION**

**PLEASE READ CAREFULLY**

Please make sure that you have the following information as it relates to your specific income situation for all members of your household. AT THE TIME OF YOUR APPOINTMENT. We will need COPIES of the following or you may bring the originals and we will make copies for you.

1. **INCOME INFORMATION:** (For all household members 55 years of age and older)
  - a. If Employed, bring the name, address, and phone number of your employer and the name of your immediate supervisor. Bring your last 6 paycheck stubs.
  - b. If you are receiving Social Security, SSI, VA and/ or private pensions, bring your Social Security number and the latest notice that you have on the status of your pension, Social Security benefits and Veterans benefits. We will also need the name and address of the provider of benefits and any identification numbers. This documentation should be dated after June 1, 2016.
  - c. If you are receiving Public Aid, bring your case identification number, and if possible, a letter from your caseworker listing your family members and total grant. Have available the name of your caseworker.
  - d. If you are receiving unemployment compensation, bring your initial certification letter and your most recent letter from your UCB office.
  - e. If you are receiving Alimony, bring the name and address of the person who provides support. Bring a copy of the court documents showing the amount of court ordered support.
  - f. ANY OTHER INFORMATION on monies received regularly (Gifts, rental. Income, etc.).
  - g. If you are receiving a student loan or financial assistance from an institution of higher education in the form of scholarships grants, etc., bring documentation showing the source and amount of such loan(s) and student financial assistance.
  
2. **ASSETS:** (For ALL household members)
  - a. Bank Accounts (Checking and Savings) Money Market Accounts, Certificates of Deposit, Annuities and Credit Union Accounts: Bring in bank names, addresses, and account numbers for ALL accounts.
  - b. Stocks and Bonds: Bring in stock certificates and dividend information. Bring in copies of all bonds and the name and address of all brokers.
  - c. Mutual Accounts: We need your MOST CURRENT STATEMENT showing the AMOUNT AND DIVIDENDS EARNED.
  - d. IRA/401(k)/ Keogh Accounts: Name of financial institutions, addresses and account numbers of ALL IRA/401(k)/ Keogh accounts.
  - e. A Market Evaluation of any Personal Property or Real Estate that you own(ed) WITHIN THE LAST TWO YEARS. If you have sold property within the last 2 years, we need to see the NET MONIES REALIZED FROM THE SALE.
  - f. All monies and/ or property in TRUST or HELD IN A SAFETY DEPOSIT BOX.
  
3. **SCHOOL (if applicable):**
  - a. For students 55 years of age or older, name and address of school.
  - b. For students who are Head or Co-Head and between 18 and 24 years of age, a current year tax return. If you did not file a tax return then bring the current tax return(s) for your parents.
  - c. Name and address of schools attended by all household members under the age of 18.
  
4. **NEW MOVE-IN CERTIFICATION ONLY:**
  - a. Birth Certificates for ALL members of the household.
  - b. Original Social Security cards for ALL members of household.
  - c. Name, address and phone number of all landlords for the past five years.