Income Screening: What to Bring to Your Appointment

FULL CIRCLE management

Gather the documents below that match your situation. **Bring originals** – we will make copies for you. All documents must be **dated within the last 4 months.** Not sure what to bring? Call us and we will help.

MOVING IN FOR THE FIRST TIME? Bring These for Everyone in Your Home

- ☐ **Photo ID** for everyone age 18+ *(driver's license, state ID, passport, U.S. military ID, or a photo ID issued by a federally recognized tribal nation)*
- ☐ **Original or certified birth certificate** for every person in your home *(Can't find it? Contact us before your appointment.)*
- ☐ **Original Social Security card** for every person in your home *(Can't find it? Contact us before your appointment.)*

YOUR INCOME (Everyone age 18+ must provide income documents)

Bring the documents below that show HOW YOU EARN OR RECEIVE MONEY that apply to you.

Type	What to Bring
☐ **Jobs / Wages**	1. Your 2 most recent pay stubs *(in a row, no gaps).* 2. Name, address, and phone number of your employer and your supervisor's name.
☐ **SSI**	1. Your most recent SSI benefit letter or notice. 2. If you don't have one, call Social Security at 800-772-1213 or visit SSA.gov to request a current benefits statement.
☐ **Social Security, VA, or Pension**	Your benefit or award letter for this year showing the amount you receive.
☐ **Retirement Withdrawals**	A statement showing how much you take out and how often. *(401(k), IRA, etc.)*
☐ **Public Aid / SNAP**	1. A current letter from your caseworker listing who is in your household and your total grant. 2. Your case ID number and caseworker's name.
☐ **Unemployment**	1. Your initial certification letter. 2. Illinois residents: Log into ides.illinois.gov and print out your full payment history. We can help you do this at your appointment.
☐ **Child Support or Alimony**	1. A recent printout showing the amount you receive. 2. If no printout is available, the name and address of the person who pays you.
☐ **Money from Others / Gifts**	Name and address of anyone who gives you money or pays your bills.
☐ **Student Aid**	Documentation showing the source and amount of any loans, scholarships, or grants.

YOUR MONEY AND ASSETS (All household members)

Bring documents for any of the following that apply to you.

Type	What to Bring
☐ **Bank Accounts**	1. Most recent statement for every account *(checking, savings, money market, CD, annuity, credit union).* 2. Bank name, address, and account number for each account.
☐ **Prepaid Cards**	The card itself plus an ATM receipt or printout showing the current balance *(e.g. Direct Express, ReliaCard).*
☐ **Stocks and Bonds**	1. Stock certificates, bond documents, and dividend information. 2. Name and address of any brokers.
☐ **Mutual Funds**	Most recent statement showing the current value and any dividends earned.
☐ **Trust or Safe Deposit Box**	Documentation showing the current value of money or property held.
☐ **Real Estate / Property**	Documentation showing the current market value and an estimate of costs to sell.
☐ **Sold Assets (last 2 years)**	Documentation showing what it was worth, how much you received, and the date of the transaction. *(ex: house, car, or another valuable item)*

SCHOOL INFORMATION (if applicable)

- ☐ **Students age 18+:** Provide the name and address of your school.
- ☐ **Main leaseholder age 18-24 and a student:** Bring your most recent tax return. If you did not file and still have ties to your parent(s), bring their most recent tax return.
- ☐ **Children under 18 in your home:** Provide the name and address of each child's school.

EQUAL HOUSING OPPORTUNITY