

MANDATORY FINANCIAL & RELATED INFORMATION (D)

PROPERTY NAME: HYNES ST, LENOX

1. INCOME VERIFICATION: *Check off all which are appropriate and included in your submittal.*

The most recent five (5) **consecutive** pay stubs for all jobs (check/direct deposit stubs);

If self-employed – Last 12 Months income and expense report

Child support/Alimony Statement

Benefits Letters (SS, SSI, SSDI, SSP, VA, etc.)

Workers Compensation, Unemployment, Severance, etc.

Retirement Income (Pension, Annuity, etc.)

Gift Letter.

NOTE: you need to provide 5 paystubs whether you are paid weekly, bi-weekly or monthly

NOTE: If you have a source of income not listed above, provide appropriate documentation.

2. ASSET VERIFICATION: *Check off all which are appropriate and included in your submittal*

Checking Accounts – Last ***three (3) months*** of full statements – EVERY PAGE FRONT AND BACK.

Savings Accounts/Money Market Accounts/CD's – Last ***three (3) months*** of full statements.

Mutual Funds/Stocks – Current Statement

NOTE: If you have cash deposits or non-payroll or income deposits you MUST identify where the funds have come from. If you fail to explain they will be counted as income, which may put you over the income limit.

NOTE: Do NOT provide a running transaction list of activity. You must provide the individual statements.

3. FEDERAL TAX RETURNS- Last Three Years (No STATE TAX RETURNS)

NOTE: Provide all pages that are submitted to the IRS. For example, if a Schedule C is submitted to the IRS but is not included in your application, your application will be considered incomplete.

NOTE: If you filed but do not have copies of your Federal Income Tax returns, you can obtain a copy of your transcripts using form 4506-T that you can obtain at irs.gov

NOTE: If you have not filed tax returns you must provide a letter from the IRS to verify the non-filing of your tax returns. Request using form 4506-T that you can obtain at irs.gov

4. W2 and 1099-R Forms Last Three Years
5. Other information that may be required:

Divorce or Separation Agreement: If the applicant is in the process of a divorce or separation, the applicants must provide legal documentation the divorce or separation has begun or has been finalized. Information must be provided regarding the

distribution of family assets. If you are unable to provide, then both parties income/assets will be used in determining eligibility.

Reasonable Accommodation: If you require a Reasonable Accommodation, you must request the reasonable accommodation as part of your application and if documentation is required, i.e. doctors letter, it MUST be included with the application.

Unborn Child: A household may count an unborn child as a household member. The household must submit proof of pregnancy with the application i.e., letter from doctor.

Student Status: Proof of Student status for dependent household members over age 18 and full-time students. Letter from High School or College providing student status, full time or part time for current **and** next semester.

Applicant Signature _____

Date: _____

#HereForGood



Berkshire United Way
Community Partner



Applicants will not be discriminated against on the basis of race, color, national origin, disability, age, ancestry, children, familial status, genetic information, marital status, public assistance reciprocity, religion, sex, sexual orientation, gender identity, veteran/military status, or any other basis prohibited by law.