

APPLICATION CHECKLIST

The following is a list of information needed to determine income-eligibility for Program assistance. Please provide all *applicable* information with your completed application. All adult (over 18 years of age) household members must provide all income documentation. Thank you.

Income Tax Documentation:

____ Copies of recent year of *signed*, filed, income tax returns (both MA and IRS) documents (1040, 1098, All schedules) including W-2 forms and 1099 statements for all adult household members. Applicants must have filed federal income tax returns in the most recent year prior to the application by April 15. If extensions are filed, we must wait until the return has been filed.

____ If self-employed, include year-to-date Profit and Loss statements (2 complete years) and last four (4) quarterly tax payment documents. Self employed applicants may be required to provide additional information if necessary.

Financial Institution Account Information:

____ Copies of last two (2) months of information (All checking, savings, IRA, etc.)
____ Copies of interest/dividend income of over \$100.00/annually
____ Copies of any stock statements for previous three months

Verification of Income:

Last 60 days of:

____ Payroll stubs
____ Alimony
____ Child support
____ Social Security (annual benefit statement)
____ Pension statement
____ Social Security Disability Insurance (If not receiving SSDI, applicant may be required to submit evidence of disability)
____ Unemployment
____ Government assistance (this includes any benefit awards for housing subsidies)
____ Other (identify): please provide proof of identification (Copy of Drivers license, passport, birth certificate, etc.)
____ Life Insurance policies (identify policy and type)
____ Full time student status (if you have any children over 18 that are full time students you must provide notice from the school of their full time student status)

You may provide any additional information if you feel it is applicable to you and your household.

The City of Waltham may request additional information if necessary to make a determination of eligibility.