

**THE INFORMATION LISTED BELOW IS REQUIRED  
FOR THE APPLICANT AND ANY CO-APPLICANT**

**INCOME**

All types that you receive during the year. This includes:

- Social security letter for the current year.
- Pension (letter or check stubs showing gross amount and any medical/dental deductions)
- Annuity (monthly insurance payout to you)
- Salary (past year's W-2)
- Family support payments (alimony, regular checks for rent, medical insurance, car insurance, etc)

**ASSETS**

Present the most recent documents or contact your financial advisor for printouts.

- Statements for money market, stock, IRA accounts, certificates of deposit, etc
- Amounts held in bonds, safe deposit boxes or cash saved in your home.
- Value of real estate your own...all property you own including timeshare, vacation home, rental property. (Call a realtor for a free fair market analysis. We need a copy of the document.)

**ADJUSTMENTS TO YOUR GROSS ANNUAL INCOME**

As with above, you need to present receipts, statements from doctors, copy of premiums or contracts

Submit medical/dental costs including:

- Medical & dental insurance premiums
- Pharmacy printout of the total amount you paid in the last 12 months for medications
- Verification of you out of pocket purchase of medical equipment: eyeglasses, dental work, walker, diabetes equipment, hearing aide, etc.
- Out of pocket cost for nursing care.

1. **If** you are applying for subsidized housing and are under the age of 62, you need to request the HUD form verifying your disability.
2. **If** you need an apartment with specific modifications or accommodations, we require a letter from your primary physician indicating the specific needs.
3. **If** you own real estate, you need to request your real estate tax information from the city/town. We can provide a letter for you

**This is a limited list for your convenience.**

**The HUD Fact sheet has the extensive list, which we urge you to use.**