

INTERVIEW PROCESSING DOCUMENTATION

PAST 3 YEARS OF HOUSING REFERENCES (to be filled out on our application at time of interview)

INCOME:

Wages, Salary, Employment
Self-Employment
Armed Forces Income
Unemployment
Public Aid
Social Security
SSI
VA Benefits/Pensions
Severance Pay
Any Other Sources of Income

RENTAL PROPERTY OR REAL ESTATE – Use assessed market value/tax assessment

HOME OWNER/REAL ESTATE

WHOLE LIFE INSURANCE POLICIES – Cash value

BANK ACCOUNTS:

Checking
Savings
Money Markets
CD's
Treasury Bills
Trust Funds
Pension/IRA/Annuity/KEOGH
Stock/Bond/Mutual Fund
Annuity
Safe Deposit Box/Cash on hand or at home (in excess of \$500)
Lump Sum received in last 24 months
Other investments

Disposal of assets within past 24 months [sale of home, closed accounts, sold stock(s)]

Marital status verification if separated, but not divorced, from spouse.

Proof of age – Birth certificate, driver's license or state ID.

Current Tax Return