

REQUIRED ITEMS FOR APPOINTMENTS WITH MHRA STAFF FOR HOUSING ASSISTANCE

INCOME

1. **Employment Income**

For **every member** of your family that works, bring the following information:

- Name, address, telephone and fax number of the employer;
- Bring the most recent four (4) pay stubs and W-2 Form(s)
- Bring in your most recent IRS-1040 Income Tax Return form
- For Self-Employed individuals, Schedule C from Tax Return, which shows the Net Income from operation of a business or profession. Also quarterly statements/spreadsheets of profit and expenses.

2. **Benefit and Support Income**

If any member of your family received any of the following types of income, bring name, address, telephone & fax numbers of the source(s) of the income and also information about the amount received.

- Severance Pay
- Unemployment Compensation
- Social Security (SS)
- Supplemental Social Security (SSI)
- Pensions
- Annuities/Retirement Fund
- Lump Sum Payments
- Disability Income/ Workman's Compensation
- Alimony
- Child Support
- Welfare or other public assistance such as cash grants, food stamps, APTD, etc.
- Regular support payments from anyone outside of your household including offers of non-monetary benefits. (example: diapers/child care/cell phone bills etc.)
- Educational Grants and Scholarships-

If any family member receives an educational grant or scholarship, bring information about the amount of assistance and the purposes for which the assistance can be used. Bring the names, address and telephone numbers of the institution providing the assistance.

ASSETS

3. **Amounts From All Bank Accounts, Credit Unions, CD(S), IRA(S), and Keogh Accounts**

Bring in documentation and the **most recent statement(s)** from **all** types of assets, **including debit card receipts showing current balance and also past (6) six months statement(s)** indicating amount of interest or dividends earned. Anyone who has a Direct Express Account must provide statement as MHRA has no access to this information.

4. **Real Estate You Own**

Bring information about the current value of the property. If you own property and rent it, supply the address and what expenses you have for the property. (Bring last year's Schedule E from your income tax forms.) Provide proof of payments for mortgage, taxes, insurance, water, sewer, or condo fees.

5. **Stock, Bonds, Trusts, Other Investments**

Bring account numbers and contract information for all investments. All annuities must include documentation of the initial deposit.

6. **Life Insurance Policies**

Bring in a statement from your insurance company which shows their company name and address and your policy number and type of insurance (i.e. Term and/or Whole Life Insurance).

7. Disposed Assets

If you have sold or given away any assets in the past two (2) years (such as giving a property or an amount of money to any other person) please bring information about those assets, including receipts of money spent.

8. Information About Family Members (Full-Time Students)

If any family members are eighteen (18) years of age or older and are still attending school full-time, provide name, address, telephone and fax number of the institution.

9. Disclosure and Verification of Social Security Numbers

If not previously submitted at time of admission or at last year's Annual Recertification, please bring original Social Security card(s) assigned to each member of the family.

EXPENSES

10. Expenses -- Bring information about any of the following expenses you expect to have during the next twelve (12) months:

Medical Expenses

(Only for: Families whose head, co-head, or spouse are 62 years old or older or disabled).

- Medical expenses NOT covered by insurance.
- Bring record of regular payments made to hospital or doctor on accumulated UNPAID medical bills not covered by medical insurance. Please provide name, address and telephone/fax numbers of applicable provider/agency (agencies).
- Medical insurance premiums or amounts deducted from your pay for medical insurance. Bring payment stub and receipt or cancelled check showing payment of medical insurance (other than Medicare).
- Prescriptions- Bring a copy of a one-year (1) computer printout from your pharmacy. Over the counter receipts must be accompanied by a doctor's letter prescribing these items.
- Out of pocket transportation expenses to and from medical appointments and pharmacy will be considered when proof of appointments and mileage/cost of transportation are provided and match. (Example: taxi cab/bus/train/tolls.)
- Service Animal- annual costs for food, veterinary bills and other expenses.

Childcare

- Out of pocket childcare expenses to care for your children while you work or go to school. Bring name, address and telephone/fax number of childcare provider(s).
- Expenses to care for a handicapped or disabled family member to enable you to work.

11. Personal Declaration Form (Attached)

Complete and bring the Personal Declaration form with you to your Annual/Transfer Recertification Interview.

12. Home Ownership

Please provide documentation of monthly mortgage, tax bill, water and /or sewer bill and insurance payments, and if applicable, condo association fee.