

HOUSEHOLD QUESTIONNAIRE

Certification Effective Date: _____

Household certifying for the following Program(s):

- Move-in _____
- Initial Cert _____
- Recertification _____
- Add a Member _____

- Section 8 _____
- Housing Tax Credit _____
- HOME _____
- Section 236 _____
- Other _____

Date & Time Rec'd: _____
Rent Amount: \$ _____

Property Name _____

Bldg/Unit # _____

HOUSEHOLD COMPOSITION

Applicants/residents, complete this application in your own handwriting. List all persons who will be living in the unit. Give the relationship of each family member to the head of household. If this eligibility application is being completed by an applicant who is applying for occupancy with an existing household, only include the information for the new applicant.

Each household member age 18 years or older and under age 18 if head, spouse, or co-head of household must disclose income and assets and sign and date this application. All Housing Tax Credit Program households must also complete an Annual Student Certification (HTC 35).

	HOUSEHOLD MEMBER'S NAME	RELATIONSHIP	DATE OF BIRTH	HAS/WILL THIS PERSON BE A STUDENT* DURING THIS AND/OR THE UPCOMING CALENDAR YEAR? YES/NO	SOCIAL SECURITY NUMBER
1		HEAD			
2					
3					
4					
5					
6					
7					
8					

* Include public and private elementary, junior & senior high, college, university, technical, trade, and mechanical schools. Do not include on-the-job training courses.

HOUSEHOLD INCOME

List current and anticipated income for the twelve-month period beginning on the anticipated move-in date or effective date of recertification.

Include all full time, part time or seasonal income even if completing this application in the off-season.

DOES ANY MEMBER RECEIVE OR EXPECT TO RECEIVE

(Check YES or NO to each item, as applicable, and include gross monthly amount. List sources on page 2.):

	YES	NO		Gross Monthly Amount
			1. Wages, salaries (include overtime, tips, bonuses, commissions, etc.)	\$ _____
			2. Does any member work for someone who pays them in cash or is self-employed.	\$ _____
			3. Regular pay for a member of the armed forces	\$ _____
			4. Public Assistance (MFIP, GA)	\$ _____
			5. Worker's compensation	\$ _____
			6. Unemployment benefits or severance pay	\$ _____
			7. Student financial assistance (public or private, not including student loans)	\$ _____
			8. Child support (check yes if you have a court order, even if you are not receiving the full amount awarded)	\$ _____
			9. Alimony/Spousal Maintenance	\$ _____
			10. Social Security income (including unearned income of minor children)	\$ _____
			11. Disability benefits including social security disability	\$ _____
			12. Regular payments from pensions (PERA, railroad, etc.)	\$ _____
			13. Regular payments from retirement benefits	\$ _____
			14. Death Benefits	\$ _____
			15. Regular payments from annuities or life insurance dividends	\$ _____
			16. Regular payments from inheritance, insurance settlement, lottery winnings, etc.	\$ _____
			17. Net income from rental property	\$ _____
			18. Regular cash and non-cash contributions, assistance with paying bills or gifts from individuals not living in the unit (not including groceries)	\$ _____
			19. Are any changes to income expected within the next 12 months due to a raise, bonus or other reason?	\$ _____
			20. Other (list) _____	\$ _____

HOUSEHOLD ASSETS

Yes	No	DOES ANY HOUSEHOLD MEMBER (INCLUDING CHILDREN) HAVE MONEY HELD IN:	CURRENT BALANCE
<input type="checkbox"/>	<input type="checkbox"/>	21. Checking Accounts (6 month average balance)	\$
<input type="checkbox"/>	<input type="checkbox"/>	22. Savings Accounts (include cash cards used as savings accounts)	\$
<input type="checkbox"/>	<input type="checkbox"/>	23. Stocks	\$
<input type="checkbox"/>	<input type="checkbox"/>	24. Capital Investments	\$
<input type="checkbox"/>	<input type="checkbox"/>	25. Bonds	\$
<input type="checkbox"/>	<input type="checkbox"/>	26. Trusts*	\$
<input type="checkbox"/>	<input type="checkbox"/>	27. Securities	\$
<input type="checkbox"/>	<input type="checkbox"/>	28. Whole or Universal Life Insurance Policy (do not include term life insurance)	\$
<input type="checkbox"/>	<input type="checkbox"/>	29. 401K*	\$
<input type="checkbox"/>	<input type="checkbox"/>	30. IRA/KEOGH Accounts	\$
<input type="checkbox"/>	<input type="checkbox"/>	31. Certificates of Deposit	\$
<input type="checkbox"/>	<input type="checkbox"/>	32. Pension/Retirement/Annuity accounts	\$
<input type="checkbox"/>	<input type="checkbox"/>	33. Money Market Funds	\$
<input type="checkbox"/>	<input type="checkbox"/>	34. Treasury Bills	\$
<input type="checkbox"/>	<input type="checkbox"/>	35. Safety Deposit Box	\$
<input type="checkbox"/>	<input type="checkbox"/>	36. Lump Sum Payment (i.e., inheritance, insurance settlement, lottery winnings, capital gains)	\$
<input type="checkbox"/>	<input type="checkbox"/>	37. Are any accounts held jointly with someone not in the unit? Which account and with whom? _____	
<input type="checkbox"/>	<input type="checkbox"/>	38. Other _____	

*Include Trusts, 401K, etc., only if the accounts are accessible to the household prior to termination of employment, retirement, or death. If you are unsure, list the account and it will be verified.

Yes	No		Value
<input type="checkbox"/>	<input type="checkbox"/>	39. Do you now own a home or other real estate?	\$
		If yes, list address(es): _____	
<input type="checkbox"/>	<input type="checkbox"/>	40. Do you receive payments for a home you sold by contract for deed?	\$
<input type="checkbox"/>	<input type="checkbox"/>	41. Do you have any coin collections, antique cars, gems/jewelry, stamps or any other items held as an investment (wedding rings and personal jewelry do not count)?	\$
<input type="checkbox"/>	<input type="checkbox"/>	42. Are any assets held jointly with another person? List person and asset(s). _____	

Enter combined cash value of all household assets \$

DO NOT LEAVE THIS SECTION BLANK.

From 1-42, **income and assets** above, provide contact information for all "YES" checked items. All information must be verified. (If a household member has more than one source of income and/or asset, use a separate line for each source. Use additional sheets, if necessary.)

Item Number	HH Member	Name and mailing address of income or asset source	Contact Name & phone/fax number

Please attach documentation available to verify income (e.g., divorce/settlement papers, tax returns, social security benefit award letter, etc.).

DEDUCTIONS AND ALLOWANCES
For Section 8/236 HUD programs only:

A. Day Care Amount

Do you have child care expenses for child/ren under age 13 because you work, are actively seeking employment or attending school? Yes No \$ _____

If yes, name and address of provider _____

\$ _____ paid per month. Is any portion paid by another person or agency? Yes No

If yes, name and address of provider _____

Do you pay for a Care Attendant or any equipment for a handicapped member of the household necessary to permit that person or someone else in the household to work? Yes No \$ _____

If yes, name and address of provider _____

\$ _____ paid per month. Is any portion paid by another person or agency? Yes No

If yes, name and address of provider _____

B. Medical – complete if the head of household, co-head or spouse are at least 62 years old, handicapped or disabled.

Do you have Medicare? Yes No \$ _____

Do you have any other kind of medical insurance? Yes No \$ _____

If yes, name and address of insurer _____

Do you receive medical assistance? If yes, do you have a monthly spend-down? Yes No \$ _____

Do you pay for prescription medication? Yes No \$ _____

Name and address of pharmacy: _____

Do you have any non-prescription (over the counter) medication that your doctor has requested you to use on a regular basis (e.g., insulin, aspirin, etc.)? Yes No \$ _____

Do you have any outstanding medical bills on which you are paying? Yes No \$ _____

If yes, indicate the types of bills owed: _____

Do you expect to have extraordinary medical/dental expenses in the next 12 months? Yes No \$ _____

If yes, list the amount and type of expense: _____

Name and facility where this can be verified: _____

Doctor's name and address: _____

Please bring receipts for your non-prescription medication.

I/We hereby certify that I/We Have Have not sold or given away any assets for less than Fair Market Value during the two year (24 month) period preceding the date of this questionnaire. Any assets sold or disposed of for less than Fair Market Value must be identified below:

Household Member	Asset & Estimated Market Value	Date sold/disposed	Amount Received
_____	_____	_____	\$ _____
_____	_____	_____	\$ _____

ADDITIONAL INFORMATION

The following questions pertain to every member of the household.
Check either **YES** or **NO** in response to each question. Add an explanation below for all items checked YES.

Yes	No	
<input type="checkbox"/>	<input type="checkbox"/>	Will any household member, including children, live in the unit on a less than full time basis?
<input type="checkbox"/>	<input type="checkbox"/>	Do you anticipate any change in your household (someone moving in or out) during the next 12 months?
<input type="checkbox"/>	<input type="checkbox"/>	Does any adult member of the household have zero income? If yes, name(s): _____
<input type="checkbox"/>	<input type="checkbox"/>	Does/will the household receive rent assistance? If so, indicate from what source (Section 8, Rural Development RA, etc.).
<input type="checkbox"/>	<input type="checkbox"/>	Does your household have any needs that might be better served by a unit which is accessible to persons with mobility, hearing or visual impairments?
Explanation:		

SIGNATURES

I/we certify that the foregoing information is true and complete to the best of my/our knowledge, and authorize the Landlord to make inquiries to verify the statements herein. I/we further understand that any intentional misrepresentation on this form might result in a default in the rental agreement and/or eviction of this household. If any of the aforementioned information changes, I/we agree to notify Landlord immediately.

Applicant/Resident Signature _____	Date _____
Applicant/Resident Signature _____	Date _____
Applicant/Resident Signature _____	Date _____
Applicant/Resident Signature _____	Date _____

This applicant/resident required assistance in completing the Household Questionnaire due to: _____

Assistance was provided by: _____ Date: _____