



# **NEW RESIDENT ADMINISTRATIVE ADMISSIONS REQUIRED DOCUMENTS**

*Documents needed for Move-In Interview and Initial Rent Certification*

## **DOCUMENTATION REQUIRED TO VERIFY THE FOLLOWING:**

### **1. SOCIAL SECURITY NUMBER:**

- Original Social Security card or one of the following:
- Driver's license with SSN
- Identification card issued by a federal, state, or local agency, a medical insurance provider, or an employer or trade union.
- Earnings statements on payroll stubs
- Bank statement
- Form 1099
- Benefit award letter
- Retirement benefit letter
- Life insurance policy
- Court records

\*If the Social Security Record is not presented, the resident will be asked to sign a statement which will be provided, that they will obtain and provide one of the documents listed above as soon as possible.

### **2. BIRTH DATE:**

- Birth Certificate
- Baptismal Certificate
- Military Discharge papers
- Valid Passport
- Census document showing age
- Naturalization certificate
- Social Security Administration Benefits printout

\*If the Birth Date documentation is not presented, the resident will be asked to sign a statement which will be provided, that they will obtain and provide one of the documents listed above.

### **3. CITIZENSHIP:**

For U. S. citizens – Usually, one of the following documents: U.S. Birth Certificate, U.S. Passport; U.S. certificate of citizenship or naturalization certificate. If these documents can not be furnished, and for non-citizens, please contact Accounting for a more detailed list of acceptable documents as soon as possible.

#### **4. INCOME:**

##### **WAGES:**

- Paycheck stubs or earning statements; most recent 6-8 consecutive pay stubs.
- W-2 Forms, if applicant has had same employer for at least two years and increases can be accurately projected.

##### **SOCIAL SECURITY and OTHER WELFARE PAYMENTS:**

- Current or recent check stubs with date, amount, and check number recorded by the owner.
- Award letters or computer printout from court or public agency.
- Copies of validated bank deposit slips, with identification by bank.
- Most recent quarterly pension account statement.

#### **5. ASSETS:**

- Passbooks, checking, or savings account statements, certificates of deposit, property appraisals, stock or bond documents, or other financial statements completed by financial institution. Use current balance in savings accounts and average monthly balance in checking accounts for last 6 months.
- Copies of real estate tax statements, if tax authority uses approximate market value.
- Quotes from attorneys, stockbrokers, bankers, and real estate agents that verify penalties and reasonable costs incurred to convert asset to cash.
- Copies of real estate closing documents that indicate distribution of sales proceeds and settlement costs.

\*If the resident has a payee, and the resident name is on the account, then it must be reported as an asset.

\*\*If the resident is receiving benefits, but does not have a checking or savings account, please confirm if they have a Direct Express or NetSpend type of account where benefits are issued. For these accounts, a copy of the most-recent statement or balance is required. The balance may be obtained via an ATM, if necessary.

#### **6. MEDICAL EXPENSES:**

- Receipts or print-out(s) from the Medical or Dental provider showing proof of payment.
- Copies of cancelled checks that verify payments on outstanding medical bills that will continue for all or part of the next 12 months.
- Copies of income tax forms (Schedule A, IRS Form 1040) that itemize medical expenses, when the expenses are not expected to change over the next 12 months.
- Receipts, cancelled checks, pay stubs, which indicate health insurance premium costs, or payments to a resident attendant.
- Receipts or ticket stubs that verify transportation expenses directly related to medical expenses. If properly documented by the resident, mileage for driving personal vehicle for medical reasons will be allowed at the current IRS rate.