



**INCOME & ASSET CERTIFICATION WORKSHEET**

**APPLICANT INFORMATION:**

NAME OF BORROWER/S: A. \_\_\_\_\_  
 (Household Members)

B. \_\_\_\_\_

SOCIAL SECURITY & BIRTHDATE A. \_\_\_\_\_  
 OF BORROWER/S:

B. \_\_\_\_\_

TELEPHONE #. OF BORROWER/S: \_\_\_\_\_

ADDRESS/UNIT #. OF  
 PROPERTY TO BE PURCHASED:  
 \_\_\_\_\_

CURRENT ADDRESS: \_\_\_\_\_

**ADJUSTED GROSS INCOME\* CALCULATION:**

	<b><u>A</u></b>	<b><u>B</u></b>
	<b><u>BORROWER</u></b>	<b><u>BORROWER</u></b>
Wages, tips, other compensations	_____	_____
Interest income	_____	_____
Dividend income	_____	_____
Social Security	_____	_____
Pension	_____	_____
Other _____	_____	_____

**TOTAL ADJUSTED GROSS INCOME (A + B):** \$ \_\_\_\_\_

**\*Annual Gross Income (All adults in household)** includes income from all sources and before taxes or withholding including salary, commissions, bonuses, interest, dividends, gratuities, annuities, pensions, farm rental, partnership, estate or trust income and miscellaneous income other than:

- i. The income of any person who will reside in the unit who is under eighteen (18) years of age or is a full-time student and who is related by blood, adoption or marriage to a resident income recipient or his or her spouse; and
- ii. Non-recurring income, being the following: Casual, sporadic or irregular gifts; amounts which are specifically for or in reimbursement of medical expenses; lump sum additions to family assets, such as inheritances, insurance payments (including payments under health and accident insurance and workers' compensation), capital gains and settlement for personal or property loses; amounts of educational scholarships paid directly to the student or the educational institution, and amounts paid by the government to a veteran for use in meeting the costs of tuition, fees, books, and equipment, but in either case only to the extent used for such purposes, special pay to a serviceman head of a family who is away from home and exposed to hostile fire; relocation payments under Title II of the Uniform Relocation Assistance and Real Property Acquisition Policies Act of 1970; foster child care payments; the value of coupon allotments for the purchase of food pursuant to the Food Stamp Act of 1964 which is in excess of the amount actually charged for the allotments; and payments received pursuant to participation in ACTION volunteer programs.

PLACE OF EMPLOYMENT & ADDRESS:

BORROWER \_\_\_\_\_

CO-BORROWER \_\_\_\_\_

**ASSET CALCULATION:**

List the cash value of assets held by all residents of your household:

Cash on hand \_\_\_\_\_

Cash in checking account \_\_\_\_\_

Cash in savings account and/or  
Certificates of Deposit (including  
those held in trust) \_\_\_\_\_

Cash value of stocks, bonds, US Savings  
Bonds, and/or other securities

\_\_\_\_\_

Retirement Funds (age 65+)

\_\_\_\_\_

Value of real estate (excluding  
property to be purchased)

\_\_\_\_\_

**TOTAL ASSETS**

\_\_\_\_\_

I/we agree to provide such other financial income information as the East Edina Housing  
Foundation may request.

I/we certify that the above information is true, complete and accurate.

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Borrower

\_\_\_\_\_  
Date

\_\_\_\_\_  
Date