IF THE CREDIT/BACKGROUND CHECK IS APPROVED, YOU WILL RECEIVE A FORMAL APPLICATION PACKET.

PLEASE FIND ATTACHED THE CHECKLIST OF REQUIRED DOCUMENTS WHICH WILL BE REQUIRED WHEN YOU SUBMIT YOUR FORMAL APPLICATION.
# The Vistas of Port Jefferson Affordable Senior Housing Program in Port Jefferson, NY

## Checklist of Required Documentation (Copies Only, No Originals)

### Applicant 18 and Over

1. **Long Island Housing Partnership Application form**
   - Yes □ N/A □
   - Complete with signature and date.

2. **Four (4) most recent, consecutive paystubs**
   - Yes □ N/A □
   - That indicate year-to-date gross income. If year-to-date is not included on paystub, a letter from employer on company stationery is required. The employer letter must state the title/position, start date, rate of pay, hours worked per pay period, frequency of pay and year to date gross income.

3. **Self-employed applicants must provide a letter**
   - Yes □ N/A □
   - From a CPA or attorney indicating the amount you expect to receive for the next 12 months or must provide a notarized **year-to-date** profit and loss statement.

4. **Documentation for social security (copy of 2020 award letter)**
   - Yes □ N/A □
   - Child support, pensions disability, unemployment, retirement funds, income from rental property and documentation for any other income you may receive.

5. **W2 and 1099 Statements.**
   - 2019 Yes □ N/A □
   - 2018 Yes □ N/A □
   - 2017 Yes □ N/A □

6. **Copies of SIGNED federal tax returns with required schedules for the last three years. (Please sign your federal returns where it says “sign here”)**
   - Yes □ N/A □
   - If you cannot locate your federal tax returns, you can go to the IRS website and printout the **tax return transcript** and **wage and income transcript**.

7. **Two (2) most recent consecutive months of bank statements (all pages) OR 60 days printout of transactions for all accounts including retirement and investment accounts. The statement/printout must show the name of the bank, account holder’s name, running balance and the last four digits of the account number.**
   - Yes □ N/A □

8. **Documents showing balance and/or value of all stocks bonds, treasury bills, certificate of deposits, money market funds, etc.**
   - Yes □ N/A □

9. **School transcripts for family members over 18**
   - Yes □ N/A □

10. **Notarized, “gift” letter showing monthly monetary gift provided by individual(s) residing outside of the The Vistas of Port Jefferson household**
    - Yes □ N/A □

11. **Employment Verification Form (enclosed) – Must be completed by each employer OR a letter from your employer on company letterhead, stating that you are employed and your gross annual salary.**
    - Yes □ N/A □

12. **Information Release Form (enclosed) - Each household member age 19 and over must fill out a separate form**
    - Yes □ N/A □

13. **Request for Alimony and Child Support (enclosed) - (If there is no other child support proof)**
    - Yes □ N/A □
14. Legal separation agreement/stipulation of settlement or divorce decree
   Yes □ N/A □

15. Proof of rental assistance subsidy
   Yes □ N/A □   Yes □ N/A □   Yes □ N/A □

16. Market Analysis for all properties owned
   Yes □ N/A □   Yes □ N/A □   Yes □ N/A □

17. Documentation on balances for mortgages/liens on all properties owned
   Yes □ N/A □   Yes □ N/A □   Yes □ N/A □

18. Proof of Age
   Yes □   Yes □   Yes □

Comments:
_____________________________________________________________________________________

I understand that I may be required to supply/submit additional documentation to complete and substantiate my eligibility.

PLEASE SUBMIT DOCUMENTS IN THE ORDER LISTED ABOVE

☐ I have read and understand the Program Guidelines for The Vistas of Port Jefferson.

________________________________________  __________________________________
APPLICANT’S SIGNATURE     DATE