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 AFFORDABLE SENIOR HOUSING PROGRAM IN PORT JEFFERSON, NY
CHECK LIST OF REQUIRED DOCUMENTATION (COPIES ONLY, NO ORIGINALS)

1. Long Island Housing Partnership Application form (enclosed) – Complete with signature and date. 
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

2. Four (4) most recent, consecutive paystubs 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.
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

3. Self-employed applicants must provide a letter 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.
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

4. Documentation for social security (copy of 2019 award letter), child support, pensions disability, unemployment, retirement funds, income from rental property and documentation for any other income you may receive (for child support or alimony you may use enclosed form)
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

5. W2 and 1099 Statements. 2018 Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

6. Copies of SIGNED federal tax returns with required schedules for the last three years. (Please sign 2nd page bottom of your federal returns where it says “sign here”. If you filed 1040EZ, please sign first page bottom of your return where it says “sign here”)
   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.
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

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 □ Yes □ N/A □ 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 □ Yes □ N/A □ Yes □ N/A □

9. School transcripts for family members over 19
   Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

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

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

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

13. Request for Alimony and Child Support (enclosed) - (If there is no other child support proof)
    Yes □ N/A □ Yes □ N/A □ 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. Application for Residency
    Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

19. Proof of age
    Yes □ N/A □ Yes □ N/A □ Yes □ N/A □

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.

Applicant’s signature ____________________________ Date ____________________________

Application’s Signature ____________________________ Date ____________________________

FORM 16
ADDITIONAL DOCUMENTS REQUIRED

PROVIDE THE FOLLOWING DOCUMENTS IN ADDITION TO THE REQUIRED DOCUMENTS ON THE CHECKLIST:

• 2019 W2 STATEMENT(S) AND/OR 1099 STATEMENT(S)
• SIGNED 2019 FEDERAL TAX RETURN W/REQUIRED SCHEDULES IF FILED
• 2020 SOCIAL SECURITY AWARD LETTER