Applicant Document Checklist

Please review the list below for documents needed at your interview. Not everything shown below will be applicable to your situation, but if in doubt, please call in advance of your appointment.

Please note, if you do not show up for your interview, and you do not call to cancel, it will be assumed you are no longer interested in residing at The Ledges and you will automatically be withdrawn and removed from the waitlist.

Required

Birth Certificate(s) for ALL Household Members, Photo ID(s), Social Security Card(s).

For Ashland Residency Preference, two documents, either:

One utility co. bill in your name dated within the last 60 days e.g., electric; oil; gas; or landline telephone; Plus
Current signed lease or;
Proof of Voter Registration, or;
Proof of auto insurance (showing address where car is garaged).

Employee of Ashland Preference:

Paystubs, Offer Letter

If you are a mobile voucher holder, proof of your current voucher needs to be brought to your appt.

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Income

- ☐ Employment – Includes: Full Time/Part Time/Self-Employment/Seasonal: wages/salary including tips, bonus and commission *(if applicable)*,
  - 2 months consecutive/current paystubs
- ☐ Federal Tax Returns
  - 1 year which includes copies of recent W2('s), 1099's, etc. for wage earners
  - 3 years if self-employed please, plus current Profit and Loss
    - *(if self-employed you are required to file taxes)*
- ☐ Pension/Annuity payments and Veteran Benefits (recent statement)
- ☐ Social Security, SSI, SSDI and SSP benefits (most recent benefit letter)
- ☐ Disability Insurance payments, Unemployment Compensation Benefits (current printout from the unemployment office or online)
- ☐ Worker's Compensation - Form DOL 203
- ☐ Child Support - Copy of court order and/or state child support enforcement agency documentation
- ☐ Alimony- Copy of Divorce Decree
- ☐ Separated – Copy of Separation Agreement
- ☐ Adoption Subsidy Payments, Education Grants, Scholarships or Stipends (printout from financial aid department), Trade Union Benefits, TANF/Public

Assistance (recent award letter from DTA), Recurring contributions and/or gift (monetary or not) from friend/relatives, Other (please be prepared to explain)

Asset Information

- ☐ Checking Accounts (3 months current consecutive bank statements-all pages),
- ☐ Savings Accounts (current bank statement-all pages)
- ☐ Stocks or Bonds (including US Savings Bonds)- copies of paper bonds and/or statements,
- ☐ Mutual Funds/ Trust Accounts (recent statements and/or documentation)
- ☐ Certificate of deposits (recent statement)
- ☐ IRA Accounts (401k, Roth, Keogh or Other Retirement Investment) most recent statements
- ☐ Whole Life Insurance Policy - recent statement
- ☐ Real Estate Owned - Most recent mortgage statement.
  - **If property is for sale, a copy of Listing Agreement is required
  - ** If property is being rented, copies of all expenses related to the rental AND a copy of fully executed lease showing current rental income is required.
- ☐ Real Estate sold within the past two (2) years - Copy of HUD Settlement Sheet
- ☐ Information regarding any asset disposed of for less than fair market value within the past two (2) years

Should you have any questions regarding this documentation or your appointment, please contact us at 781-664-4029.
Please come to your appointment prepared.