

HOUSING DEPARTMENT WORKFORCE OWNERSHIP ANNUAL REQUALIFICATION CHECKLIST

HOMEOWNER

- ☐ **Tax Returns** for most recent year (including all schedules) Tax returns are required for *both personal and business if applicable for all adult household members who are not attending college or are age 25 or higher. You must submit the **ENTIRE** tax return*
- ☐ **Tax Return Supplemental Information** (W-2s, 1099s or any other relevant attachments)
- ☐ **Divorce Decree.** If divorced a divorce decree/settlement statement
- ☐ **Workforce Owner Annual Qualification Application** completed and signed.
- ☐ **Authorization to Release Information Form** signed.
- ☐ **Other Income Documentation** If you receive income from a source other than employment, documentation for the income source (in form of statement, award letter, or other Housing Department approved form)
- ☐ **Proof of Homeowners Insurance Coverage** (a copy of your declaration page)
- ☐ **Proof of Retirement Document** (if retired)

Retirees: *If an adult in the household has reached the age at which the Federal Social Security Administration allows an individual to start collecting Social Security, the retiree will no longer need to submit verification of the employment/income requirement of the restriction. Proof of retirement age must be provided. Please contact the Housing Department if you have questions about required documentation for retirees.*

SELF EMPLOYED

- ☐ **Profit and Loss Statement and Balance Sheet** (current year and previous year if tax returns not yet filed).
 - ☐ **Log of hours worked** (current & previous year) Use Housing Department Form or one with same information.
- SELF EMPLOYED with less than 2 employees**
- ☐ **Client list** with addresses and invoiced amounts for current and prev. year. We do not need names. This may also be required for businesses with more than 2 employees on a case-by-case basis.

EMPLOYER

- ☐ **Affidavit for Current Employment** completed by each employer of every adult in the household (except those under age 25 attending college). Use additional form(s) if people have multiple jobs. Must be submitted directly to the Housing Department by uploading to the Employer Portal found on the Housing Department Website. This form may **NOT** be completed by Homeowner