

HOUSING DEPARTMENT WORKFORCE OWNERSHIP ANNUAL REQUALIFICATION CHECKLIST

HOMEOWNER

- ☐ **Tax Returns:** Submit complete tax returns (with all schedules) for the most recent tax year for all adult household members age 25+ or not attending college. Include both personal and business returns, if self-employed. You must submit the **ENTIRE** tax return. *Tax returns cannot be emailed.*
- ☐ **Tax Return Supplemental Information:** W-2s, 1099s or any other relevant attachments.
- ☐ **Workforce Owner Annual Qualification Application:** Completed and signed.
- ☐ **Affidavit of Employment:** One form for each employer of each household member. Must be completed and submitted directly by the employer (see notes below).
- ☐ **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 a statement, award letter, or other Housing Department approved form)
- ☐ **Proof of Homeowners Insurance Coverage:** Copy of your "Declarations Page".

- ☐ **If Divorced:** Copy of your divorce decree/settlement statement.
- ☐ **If Retired:** Proof of retirement age. Example: photocopy of driver's license. Once an adult household member reaches the age 62, they no longer need to submit employment/income verification. Proof of retirement age must still be provided.

SELF EMPLOYED HOMEOWNERS

- ☐ **Profit and Loss Statement and Balance Sheet** (current YTD 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.
 - ☐ **Business Tax Returns** with all schedules.
 - ☐ **Local Business Application** if not completed already in past years.
- SELF EMPLOYED with less than 2 employees**
- ☐ **Client list** with addresses and invoiced amounts for current and previous year. We do not need names. *This may also be required for businesses with more than 2 employees on a case-by-case basis.*

AFFIDAVIT OF EMPLOYMENT NOTES

- Each employer of every adult household member (except those under 25 and in college) must complete an Affidavit for Current Employment. A separate form is required for each job.
- Employers must submit forms directly to the Housing Department via the Employer Portal on the Housing Department website. Employees may not complete this form.
- Employers must complete the official form provided with this letter and on our website. **No alternate or outdated versions will be accepted.**