

Client Name: \_\_\_\_\_ Phone number: \_\_\_\_\_ New [ ] Return [ ]

\_\_\_\_\_ Release of Information

Appt. Date      Appt. Time      Benefits Advisor      E-mail Address

### **FINANCIAL ASSISTANCE CHECKLIST**

This checklist is to assist you on completing the application process to determine temporary emergency financial assistance. Assistance is determined based on all household income and expenses paid out in the **past 30 days**. New documentation will be required for any future assistance based on income and expenses for the past 30 days.

**INCOME:** all income in the household

- \_\_\_\_\_ Checking/Savings Bank Transactions
- \_\_\_\_\_ Job/employment
- \_\_\_\_\_ Unemployment
- \_\_\_\_\_ Retirement
- \_\_\_\_\_ SS/SSI/SSD/SSDI
  
- \_\_\_\_\_ SCD/NSCD
- \_\_\_\_\_ Disability Pay/WC
- \_\_\_\_\_ Annuity/401K
- \_\_\_\_\_ Child Support In
- \_\_\_\_\_ Government Assistance
- \_\_\_\_\_ Rental Property Income
- \_\_\_\_\_ AMHA Housing Utility Stipend
- \_\_\_\_\_ All School Stipends: VocRehab, G.I. Bill
- \_\_\_\_\_ All Other Income
  
- \_\_\_\_\_ Child Support/Alimony
- \_\_\_\_\_ Income Tax
  
- \_\_\_\_\_ DD214/Discharge Papers
- \_\_\_\_\_ SS Card #
- \_\_\_\_\_ Marriage Certificate/Domestic Partner
- \_\_\_\_\_ Birth Certificates
- \_\_\_\_\_ Adoption/Custody Papers
- \_\_\_\_\_ Death Certificates

**EXPENSES:** Expense paid out of income

- \_\_\_\_\_ AMHA/Section 8 Housing
- \_\_\_\_\_ Rent/Mortgage (**Mortgages require FAX number**)
- \_\_\_\_\_ Deposit
- \_\_\_\_\_ Electric
- \_\_\_\_\_ Gas/Heating Fuel
  
- \_\_\_\_\_ Cell Phone/Landline Phone
- \_\_\_\_\_ Water/Sewer
- \_\_\_\_\_ Internet
- \_\_\_\_\_ Trash
- \_\_\_\_\_ Day Care
- \_\_\_\_\_ Vehicle
- \_\_\_\_\_ All Insurances
- \_\_\_\_\_ Loans (Credit Cards, Pay Day Loans)
- \_\_\_\_\_ Vehicle/Home Repairs if Owner
  
- \_\_\_\_\_ License/Court Legal Fees
- \_\_\_\_\_ Credit Cards (Statements)
- \_\_\_\_\_ Appliance/Furniture Rental
- \_\_\_\_\_ Medical/Prescriptions
- \_\_\_\_\_ Food
- \_\_\_\_\_ Other
- \_\_\_\_\_ Taxes (IRS, State, City, Property)