

ASSET QUESTIONNAIRE

(Complete only one form per household; include assets of children.)

For the following asset types, include the current Cash Value of **each** asset held by any family member and the actual income that the asset earns. *Cash value is **current market value minus cost to convert** an asset to cash, such as broker's fees, settlement costs, outstanding loans, penalties for early withdrawal, etc.*

Household Name:		Unit#:	
PART I. ASSETS DISPOSED OF FOR LESS THAN FAIR MARKET VALUE (FMV)			
<input type="checkbox"/> Yes <input type="checkbox"/> No		Within the past two (2) years, I/we have sold or given away assets for more than \$1,000 below their fair market value (FMV).	
Asset #1:		Date of Disposal:	
Asset #2:		Date of Disposal:	
		FMV - amt received:	
		FMV - amt received:	
PART II: FEDERAL TAX RETURN OR REFUNDABLE FEDERAL TAX CREDIT			
Have you received a federal tax return or refundable federal tax credit in the last 12 months?			<input type="checkbox"/> Yes <input type="checkbox"/> No
Amount of return/credit:			\$
PART III: NON-NECESSARY PERSONAL PROPERTY (NNPP)			
<input type="checkbox"/> Yes <input type="checkbox"/> No		I/we do not have any non-necessary personal property	
Type of Asset	(A) Cash Value*	(B) Annual Income	(B) Annual Income
Cash on Hand	\$	N/A	
Pre-paid Debit Card (including Govt. Benefits)	\$	N/A	
Checking/Savings	\$	\$	
Checking/Savings	\$	\$	
Savings	\$	\$	
Internet based assets (Cash App, Venmo, PayPal, Crowdfunding (i.e GoFundMe, etc.)	\$	\$	
Whole Life Insurance	\$	\$	
		Other: _____	\$
		Other: _____	\$
Non-Account Based			
Possessions not general held in an account such as vehicles used for recreation (e.g., RVs, ATVs, and Boats), antique cars, collectibles (e.g. stamps, jewelry, coins, and artwork.), and equipment/machinery that is not used to generate income for a business			
Description	(A) Cash Value *		
	\$		
	\$		
	\$		
	\$		
PART IV. REAL PROPERTY			
<input type="checkbox"/> Yes <input type="checkbox"/> No		I/we do not have any real property	
Description of Property	(C) Cash Value*		(D) Income
	\$		\$
	\$		\$

Signature of Applicant/Tenant	Date	Signature of Applicant/Tenant	Date
Signature of Applicant/Tenant	Date	Signature of Applicant/Tenant	Date
Signature of Applicant/Tenant	Date	Signature of Applicant/Tenant	Date