

APPLICATION/RE-CERT FINANCIAL CHECKLIST

Please use this checklist to assist you in obtaining the necessary information for your application/recertification.

Social Security Card for you and any other members of your household

Driver's License/Birth Certificate for you and any other members of your household to validate ages

Social Security/SSI/Railroad Retirement notice of award or increase

Pensions of any type require a name and address of the company or agency from whom you receive the pension

Employment requires a name and address of your employer

Savings/Checking Accounts/CD's require the name and address of the bank

Mutual Funds/Stocks & Bonds/Annuities require the name and address of the financial institution, broker or advisor

Real Estate will require your most recent tax statement

Health Insurance requires name, address, and phone number of the company/agent AND the name, address, and phone number on company billing notices, premium increases or any other correspondence

Prescriptions require a printout from your pharmacist confirming the amount that you have paid out-of-pocket within the last twelve months

Doctor/Dental/Hospital/Other Medical Bills require a copy of the receipt paid or account statement showing the payments made