

ASSET SELF-CERTIFICATION

ANNUAL ASSET THRESHOLD: _____

For households whose combined assets do not exceed the annual asset self-certification threshold. Complete only one form per household; include assets of all household members including children. **Form cannot be used for HOME/NHTF at move-in.**

Development Name: _____

Head of Household Name: _____ Unit No: _____

Certification Type: Initial Recertification (Effective Date: _____)

PART 1 – SELECT ONE OPTION:

- I/we do not have any assets at this time (move to Part 2):
- I/we have the following assets (enter n/a if you do not own the respective asset):

Note: Be sure to include the value of any cash or other asset in a safe deposit box or any other means of storage.

* Cash value is market value minus cost to convert an asset to cash, such as broker's fees, settlement costs, outstanding loans, penalties for early withdrawal, etc.

| NON-NECESSARY PERSONAL PROPERTY | | | | | | | |
|---|-------------|-------------------------------|---------------|---|-------------|-------------------------------|---------------|
| TYPE OF ASSET | CASH VALUE* | INTEREST RATE (IF APPLICABLE) | ANNUAL INCOME | TYPE OF ASSET | CASH VALUE* | INTEREST RATE (IF APPLICABLE) | ANNUAL INCOME |
| Non-necessary personal property (non-account assets such as RVs, ATVs, boats, antique cars, stamp collections, etc.) | | | | Annuities (current balance) | \$ | | \$ |
| Description: | \$ | | \$ | Brokerage accounts (current account balance (mutual funds, etc.)) | \$ | | \$ |
| Description: | \$ | | \$ | Life Insurance (not term life) | \$ | | \$ |
| Cash on hand | \$ | | N/A | Cryptocurrency (Bitcoin, etc.) | \$ | | \$ |
| Checking (current balance) | \$ | | \$ | Stocks/Bonds (current balance) | \$ | | \$ |
| Savings (current balance) | \$ | | \$ | CD/Money Market (current balance) | \$ | | \$ |
| Debit cards (not linked to an account that is listed above) | \$ | | N/A | Trust accounts (current balance) | \$ | | \$ |
| Internet based assets (Cash App, Venmo, PayPal, ApplePay, etc.) | \$ | | \$ | Lump sum amounts received (not listed in above accounts (lottery/inheritance, etc.)) | \$ | | \$ |
| Other Description: | \$ | | \$ | Other Description: | \$ | | \$ |
| [A] Total cash value of non-necessary personal property: | | | | | \$ | [B] Total Income: | \$ |

Important Note | if the above total value [A] is less than the annual asset self-certification threshold, it is not added into the Total Net Assets Section [F] below. However, total income from non-necessary personal property above is added to total income [G] below.

| REAL PROPERTY | | | |
|---------------------------------------|------------|------------------------------------|----|
| DESCRIPTION OF PROPERTY | CASH VALUE | INCOME | |
| | \$ | | \$ |
| | \$ | | \$ |
| [C] Total real property value: | \$ | [D] Total real prop income: | \$ |

| TOTAL NET ASSETS AND INCOME | | | |
|--|--|--|--|
| [E] Tax Refund. Have you received a tax return or refundable tax credit in the last 12 months? | <input type="checkbox"/> yes <input type="checkbox"/> no | value of return/credit | |
| | | \$ | Subtract tax return/credit (if any) from total net assets. See formula for [F] |
| [F] Total Net Assets: (Total real property [C] + non-necessary personal property [A] (if [A] exceeds annual asset self-certification threshold) - [E] tax return/refundable credit) | \$ | [G] Total Asset Income: [B] + [D] | \$ |

PART 2 – SELECT ONE OPTION:

- Within the past two (2) years, I/we have sold or given away assets (including cash, real estate, etc.) below fair market value (FMV). Those amounts equal a total of: \$_____ (enter the difference between FMV and the amount you received).
- I/we have not sold or given away assets (including cash, real estate, etc.) for less than fair market value during the past two (2) years.

All household members age 18 or older must sign and date.

Under penalty of perjury, I/we certify that the information presented in this certification is true and accurate to the best of my/our knowledge. The undersigned further understand(s) that providing false representations herein constitutes an act of fraud. False, misleading, or incomplete information may result in the termination of a lease agreement.

Applicant/Resident Signature

Date

Applicant/Resident Signature

Date

