



DOCUMENT CHECKLIST

Proof of Gross Monthly Income

- Social Security Income** – For proof of your Social Security Income send a copy of your Cost of Living Adjustment “COLA” letter or other verification from the Social Security Administration (SSA). If you need to obtain verification of your Social Security income, call the SSA at 1-800-772-1213
- Pension Plans**
- Veterans Benefits**
- Railroad Retirement Income**
- Unemployment Income**
- Worker’s Compensation Income**
- Gifts/Contributions**
- Rental Income**
- Gross Income From Wages** – If you are currently employed you must provide proof of your wages from the last 8 weeks. You may provide copies of pay stubs, direct deposit statements or a letter from your employer stating your current wages.

Proof of Current Financial Assets – Please provide copies of your last three (3) statements for each of the following:

- Checking Account(s)**
- Savings Account(s)**
- Certificate(s) of Deposit (CDs)**
- Mutual Fund(s)**
- IRAs (Individual Retirement Account/s)**
- Money Market Account(s)**
- Trust Account(s)**
- Annuities**
- Stocks/Bonds**

Other Documents

- Life Insurance Policy(s)** – the copy must state: face value, case surrender value, policy number, issue date, name of the insurance company, type of insurance and person insured.