

ASSET CHECKLIST

We need to know about the “assets” that every member of your household owns – including assets they own with someone who is not a household member. Please check “Yes” if a household member owns an asset, or “No” if no member of the household owns this type of asset. If you check “Yes”, you must provide verification (i.e. statements) of the value of such asset.

1. **Cash** – Money held in bank accounts, safety deposit boxes, at home or anywhere else.
 Yes No
2. **Revocable Trusts** – Money or property held for a household member’s benefit by another person who acts as a trustee.
 Yes No
3. **Rental Property or Other Capital Investments** – Real estate, equipment, or machinery rented to other people or held as an investment.
 Yes No
4. **Securities** – Stocks, bonds, treasury bills, certificates of deposit (CD’s), money market funds.
 Yes No
5. **Individual Retirement Accounts (IRA’s) and Keogh Accounts** – Money for retirement that has been deposited in special accounts.
 Yes No
6. **Retirement and Pension Funds** – Money for retirement that has been deposited in funds set up by a union or employer.
 Yes No
7. **Lump Sum Receipts** – Such as inheritances, capital gains from the sale of stock or other assets, one-time lottery winnings, or settlements on insurance and other claims.
 Yes No
8. **Personal Property held as Investment** – Such as gems, jewelry, antiques, antique vehicles, or coin or stamp collections. This does not include items for personal use, such as clothing, furniture, cars, wedding rings, and other personal jewelry.
 Yes No
9. **Life Insurance Policies** – The cash value of a whole life policy or universal life policy. This does not include term life policies.
 Yes No
10. **Assets Disposed of Within the Last Two Years** – Please check “yes” if a household member has sold, given away, or put into trusts any of the assets listed above in items 1 through 8 within the last two years.
 Yes No

I hereby certify that the answers and information provided are true, accurate, complete and correct. I fully understand that false answers and information that is not accurate, not complete and/or not correct in regard to the above questions, constitutes fraud and will result in denial or termination of participation in the Section 8 Housing Choice Voucher Program.

Signature of Head of Household

Date

Signature of Co-Head of Household

Date