

CERTIFICATION OF ASSETS OVER OR UNDER \$5000.00

Annual income includes amounts derived from assets to which any household member has access. Each family member over the age of 18 years old must complete this form.

Please check: *Section (A)* if you have **no** assets.
Section (B) if you are self-certifying **less than** \$5000.00
Section (C) if you are certifying that you have assets **greater than** \$5000.00.

Section A:

I have **No Assets** (*Review Asset Types below*). I certify that I have checked **Section (A)** with the understanding that **I have no assets greater than \$5000.00.**

Section B: *Select from Asset Types Below*

I certify that I have checked **Section (B)** with the understanding that **I have assets less than \$5000.00.** Please see the **Asset Types** below and check the boxes that represent the assets under \$5000.00.

Provide **Total** \$ _____
Interest \$ _____

Asset Types:

- Amounts in checking(C) and savings(S) accounts. (All pages of the bank statement)(C) \$ _____; (S) \$ _____
- Stocks, bonds, savings certificates, money market funds and other investment accounts. \$ _____
- Equity in real property or other capital investments. Equity is the estimated current market value of the asset less the unpaid balance on all loans secured by the assets *and* reasonable costs (such as broker fees) that would be incurred in selling the assets. \$ _____
- The cash value of trusts that may be withdrawn by the family. \$ _____
- IRA, Keogh and similar retirement savings accounts, even though withdrawal would result in a penalty. (Annual or most recent statement of the account.) \$ _____
- Some contributions to company retirement/pension funds. (401K/457) \$ _____
- Assets, which although owned by more than one person, allow unrestricted access by the applicant. \$ _____
- Lump sum receipts such as inheritances, capital gains, lottery winnings, insurance settlements, and other claims. \$ _____
- Personal property held as an investment such as gems, jewelry, coin collections, antique cars, etc.
- Cash value of Whole Life insurance policies. (Copies of the annual policy statement.) ***If the cash value of the Whole Life Insurance policy is less than \$5000.00 no verification is required.*** \$ _____

Section C: *Select from Asset Types Above*

I certify that I have checked **Section (C)** with the understanding that **I have assets greater than \$5000.00.** Please see the **Asset Types** above and check the boxes that represent the asset greater than \$5000.00. Documents required supporting this selection.

Head of Household Signature Date

Other Family Member Signature Date

Head of Household Printed Name

Other Family Member Printed Name

WARNING: Section 1001 of the Title 18 of the United States Code states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any departments of the United States Government.