

# REQUIRED DOCUMENTS CHECKLIST

## 2024 Application – Homeownership program

### For all household members (adults and children):

- Social security card:** You may copy up to six social security cards on one page.
- Proof of residency:** Provide **one item** per person—birth certificate or U.S. passport or permanent resident card (green card) or citizenship form.
- Driver's license or picture ID:** Provide for anyone who is (or will be) 18 or older by 12/31, if their proof of residency document does not include a photo.

### For applicants (borrowers) only:

- Bank statements:** Provide past two months' bank statements for all checking, savings, and certificate of deposit accounts held in the applicant's name (individually or jointly), excluding retirement accounts. All pages of the monthly bank statement are required.
- Assets:** If applicant or co-applicant owns land or a home, provide a current statement showing the monthly required payment and balance for any outstanding loans.

### For every adult in the household who is 21 or older by 12/31:

- Tax records for 2023 and 2022:**
  - Provide copy of federal tax return (Form 1040), including all pages and schedules
  - Provide W-2 forms and/or 1099 forms from all employers for past two tax years
- Paystubs:** Provide past one month's paystubs from all current employers, covering consecutive pay periods over the last four weeks.
- Self-employment:** A minimum of two years' profit and loss history is required. For 2024, provide a statement showing year-to-date income and expenses (profit & loss) covering January to September.
- Child support income:**
  - Provide copy of court order that established child support payments.
  - Provide statement showing past 12 months' child support payments received (since 10/1 last year, even if the amount received was \$0).
- Social security, SSI or SSDI income:** Provide current year's award letter for anyone in the household who is receiving this income.
- Pension, annuity, retirement income:** Provide current year's benefit letter.

## HAVE QUESTIONS OR NEED HELP?

Call or email Lisa at the Habitat office. Most questions can be handled by phone or email. See **2024 Application Instructions** for dates and times when in-person appointments can be scheduled.

**Habitat contact person:** **Lisa Ross, Homeowner Services Coordinator**

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Office Hours: Monday-Friday, 8:30 am to 5:30 pm ♦ In-Person Assistance: By appointment only!