



resident statement of assets

Instructions: Please complete both Sections 1 and 2. All adults, except married couples, must complete separate forms. Include any assets you own or co-own and assets of children.

Assets include, but are not limited to, checking or savings accounts, real estate, stocks, bonds, and retirement accounts.

Resident Name	Unit Number
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section 1 please choose one of the following

- I/We do not have any assets at this time.
- I/We have assets. My/our assets are listed below. [Please note: Certain funds (e.g., retirement, pensions, trusts) may or may not be fully accessible to you. Include only those amounts which are accessible.]

source	(a) cash value*	(b) interest rate	(a x b) annual income	source	(a) cash value*	(b) interest rate	(a x b) annual income
Savings Account	\$	%	\$	Checking Account	\$	%	\$
Cash On Hand	\$	%	\$	Safety Deposit Box	\$	%	\$
Certificates of Deposit	\$	%	\$	Money Market Funds	\$	%	\$
Stocks	\$	%	\$	Bonds	\$	%	\$
IRA Accounts	\$	%	\$	401k Accounts	\$	%	\$
Keogh Accounts	\$	%	\$	Trust Funds	\$	%	\$
Equity in Real Estate	\$	%	\$	Land Contracts	\$	%	\$
Lump Sum Receipts	\$	%	\$	Capital Investments	\$	%	\$
Benefit Cards (Direct Express, TANF, unemployment benefits)	\$	%	\$	Electronic Accounts: (Venmo, PayPal, Bitcoin, GoFundMe, etc.)	\$	%	\$

Value of Life Insurance Policies (excluding Term Life)*	\$
Additional Retirement/Pension Funds (not named above)*	\$
Value of Personal Property Held for Investment	\$
Other Assets (not included above)	\$

* Cash value is defined as market value less the cost of converting the asset to cash. Costs may include broker's fees, settlement costs, outstanding loans, early withdrawal penalties, etc.

** Personal property held for investment purposes may include, but is not limited to, gem or coin collections, art, or antique cars. Do not include items such as household furniture, daily-use autos, clothing, active business assets, or special equipment for use by the disabled.

section 2 you must choose one of the following

- Within the past two years, I/we have sold or given away assets (including cash, real estate, etc.) for more than \$1,000 below their fair market value (FMV). These assets are included above and are equal to a total of \$_____ (the value to include for each asset equals the difference between FMV and the amount actually received for the asset).
- I/We have not sold or given away assets (including cash, real estate, etc.) for less than the fair market value during the past two years.

If forms are completed electronically, one of the following boxes must be checked:

- This form was completed electronically by the resident.
- Management or someone outside of household assisted completing the form electronically (Authorization to Assist is attached).

signature

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