PRESERVATION PARTNERS

UNDER $5,000 ASSET CERTIFICATION

For households whose combined net assets do not exceed $4999.99.

Complete one form for households with joint assets or one form per person with separate assets. If a household contains both joint and separate assets, use separate forms and list the joint assets on both forms with the statements **(Joint)** next to the applicable asset.

Household Name: _____ Unit No: _____

Development Name: _____ City: _____

Complete the following:

1. Choose one:

☐ I/we do not have any assets at this time. *(if this box is checked, draw a line through the asset information below, place a zero in #3, sign and date)*

OR

☐ My/our assets include:

(please complete fully. Put a zero in any columns that do not apply)

(A) Cash Value*	(B) Int. Rate	(A*B) Annual Income	Source	(A) Cash Value*	(B) Int. Rate	(A*B) Annual Income	Source
$_____	_____	$_____	Savings Account	$_____	_____	$_____	Checking Account
$_____	_____	$_____	Cash on Hand	$_____	_____	$_____	Safety Deposit Box
$_____	_____	$_____	EBT/Debit Visa or MC	$_____	_____	$_____	Certificates of Deposit
$_____	_____	$_____	Stocks	$_____	_____	$_____	Money market funds
$_____	_____	$_____	IRA Accounts	$_____	_____	$_____	Bonds
$_____	_____	$_____	Keogh Accounts	$_____	_____	$_____	401K Accounts
$_____	_____	$_____	Equity in Real Estate	$_____	_____	$_____	Trust Funds
$_____	_____	$_____	Lump Sum Receipts	$_____	_____	$_____	Capital Investments
$_____	_____	$_____	Life Insurance Policies (excluding Term)				
$_____	_____	$_____	Other Retirement/Pension Funds not named above: _____				
$_____	_____	$_____	Personal property held as an investment**: _____				
$_____	_____	$_____	Other (list): _____				

PLEASE NOTE: Certain funds (e.g., Retirement, Pension, Trust) may or may not be (fully) accessible to you. Include only those amounts which are.

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

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

2. Choose one:

☐ I/we have not sold or given away assets (including cash, real estate, etc.) for less than fair market value during the past two (2) years.

OR

☐ Within the past two (2) 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). Those amounts* are included above and are equal to a total of: $_____ (*the difference between FMV and the amount received, for each asset on which this occurred).

3. Please complete:

The net family assets (as defined in 24 CFR 813.102) **above do not exceed $5,000 and the annual income** (add all annual income columns) **from the net family assets is $_____. This amount is included in total gross annual income.**

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/Tenant Date Applicant/Tenant Date