

## Emergency Home Repair Preliminary Interview

Applicant Name: \_\_\_\_\_

Appointment Date & Time: \_\_\_\_\_

Applicant Address: \_\_\_\_\_

**Please help me to help you by bringing in everything required (below in the blue column) that I copy for your folder!**

Applicant Address: \_\_\_\_\_

APPOINTMENT WILL BE TAKEN AT THE MORRISTOWN CITY HALL BUILDING, 100 W 1ST NORTH STREET, MORRISTOWN, TN 37813 2ND FLOOR IN THE COMMUNITY DEVELOPMENT AND PLANNING RECEPTION AREA.

**READ THIS\*\*\*\*PLEASE BRING THIS FORM ALREADY FILLED OUT TO YOUR APPOINTMENT ALONG WITH THE SOCIAL SECURITY CARDS FOR EVERYONE WHO LIVES IN THE HOUSE WITH YOU AND DRIVERS LICENSE'S OR OFFICIAL PICTURE ID FOR EVERYONE IN THE HOUSE 18 YRS OF AGE AND OLDER.**

**Your Appointment is with CAC Our Phone Number is (865) 244-3080**

**ELGIBLE INCOME IS COUNTED WHETHER THAT PERSON HELPS PAY BILLS OR NOT**

**Please Read Carefully! Required Documentation - You Must Bring This With You If You Circled Yes**

**\*\*\* All documentation must identify the recipient, Current date received, gross amounts, and type of income \*\*\***

**\*\*\* (Please answer the question below about your household income and then for each yes answer bring the Documentation listed to the right) \*\*\***

<u>Name of person receiving</u>	Yes	No	<b><u>INCOME TYPE - If you receive circle yes, if not circle no</u></b>	<b><u>Please Read Carefully! Required Documentation - You Must Bring This With You If You Circled Yes</u></b>
	Y	N	WAGES, SALARIES, TIPS, ODD JOBS	Please provide the name of the employer, contact person, phone number, and fax number so that we may submit this form for completion on your behalf
	Y	N	Do you have BUSINESS INCOME/SELF EMPLOYMENT	Income Tax Papers - <b><u>Copies of all pages of the last three years</u></b>
	Y	N	Interest from Bonds or CD's	<b>A current interest statement Showing current and YTD interest earned</b>
	Y	N	Dividends from Stocks	<b>A current dividend statement Showing current and YTD dividends earned</b>
	Y	N	Income from Real or Personal Property	Income Tax Papers - <b><u>Copies of all pages of the last three years</u></b>
	Y	N	Rental Income	Rental form will be provided to you at time of application
	Y	N	Social Security Income (to include lump sum pmt)	2016 Award Letter showing gross monthly amount received/Call 1-800-772-1213 & Request a copy
	Y	N	SSI Income ( to included lump sum pmt)	2016 Award Letter showing gross monthly amount received/Call 1-800-772-1213 & Request a copy
	Y	N	Veterans Income (VA) (to include lump sum pmt)	2016 Award Letter showing gross monthly amount received /Call 594-6158 for your 2016 Award Letter
	Y	N	Pensions/Retirements (to include lump sum pmts)	2016 Award Letter showing gross monthly amount received/Call the Company for your 2016 Award Letter
	Y	N	Annuities (to include lump sum pmts.)	2016 Award Letter showing gross monthly amount received/Call the Company for your 2016 Award Letter
	Y	N	Insurance Policy Payments (to include lump sum pmts)	<b>2016 Award Letter showing gross monthly amount received</b>
	Y	N	Disability or Death Benefits (to include lump sum pmts.)	<b>2016 Award Letter showing gross monthly amount received</b>
	Y	N	Unemployment	<b>Bring your benefit papers with you. We will give you a form to take to the unemployment office</b>
	Y	N	Disability or Workers Comp	2016 Award Letter showing gross monthly amount received
	Y	N	Severance Pay	Our wage statement will be provided at the time of application or the severance papers
	Y	N	TANF (This is for Children in your care)	Most current copy of the approval letter from DHS
	Y	N	Alimony	The Court Order showing what the client was awarded in Alimony
	Y	N	Child Support	The most recent letter from Child Support Receiver showing what was awarded & what was paid.
	Y	N	Regular Contributions or Gift	A form will be provided to be completed by the person giving the contribution or gift
	Y	N	ARMED FORCES	2016 Award Letter showing gross monthly amount received
	Y	N	ANY OTHER INCOME	From Scrapping or any other source
	Y	N	<b>ARE YOUR CITY &amp; COUNTY PROPERTY TAXES PAID UP TO DATE?</b>	<b>CITY AND COUNTY PROPERTY TAXES MUST BE COMPLETELY PAID UP TO DATE PER THE PROGRAM GUIDELINES.</b>

We do not count these toward your income. It is only used to perform an asset test.

Name of person receiving	Y	N	Asset Type - <u>If you have this, circle yes</u>	<u>Please read carefully!</u> <b>Required Documentation</b> - <u>You Must Bring This With You If You Circled Yes</u>
	Y	N	Do you Own your House? <b>OR</b> Do you Own your Mobile Home?	A copy of your <b>Warrenty or Quit Claim Deed</b> <b>OR</b> _____ <b>Title</b> to your Mobile Home <b>in your name!</b> If in another name please call us.
	Y	N	CHECKING ACCOUNTS	<b>6 months statements - all pages including any blank pages with any Deposits explained</b> <b>OR</b> <b>The Last 2 Months and have the Bank Fill Out The Enclosed Form</b>
			What Banks ? _____	<b><u>NEXT TO EACH DEPOSIT, WRITE WHERE IT CAME FROM!</u></b>
	Y	N	SAVINGS ACCOUNTS	<b>6 months statements - all pages including any blank pages with any Deposits explained</b> <b><u>OR</u> The Last 2 Months and have the Bank Fill Out The Enclosed Form</b>
			What Banks ? _____	<b><u>NEXT TO EACH DEPOSIT, WRITE WHERE IT CAME FROM!</u></b>
	Y	N	BROKERAGE ACCOUNTS	<b>Last Statement and your Last Year-end Statement</b>
			What Firms ? _____	
	Y	N	SAFE DEPOSIT BOX	Cash in Safe deposit Box
	Y	N	SECOND HOME	Deed
	Y	N	REVOCABLE TRUST	Cash value of revocable trusts available to the applicant. Bring the entire Trust Document with you.
	Y	N	RENTAL PROPERTY OR OTHER CAPITAL INVESTMENTS	Equity in rental property or other capital investments. selling the asset. Under HOME, equity in the family's primary residence is not considered in the calculation of assets for owner-occupied rehabilitation projects.
	Y	N	STOCK, BONDS TREASURY BILLS, CERTIFICATES OF DEPOSIT, MUTUAL FUNDS, AND MONEY MARKET ACCOUNTS	Bring your latest statement with you showing cash value of stocks, bonds, Treasury bills, certificates of deposit and money market accounts.
	Y	N	INDIVIDUAL RETIREMENT, 401 (K) AND KEPGH ACCOUNTS	Bring your latest statement with you for your individual retirement and Keogh accounts (even though withdrawal would result in a penalty).
	Y	N	RETIREMENT AND PENSION FUNDS	Latest retirement and pension fund statement / <b>Are you able to withdraw a lump sum or is the Retirement and/or Pension Fund transferable to a beneficiary upon your death? Y or N</b>
	Y	N	LIFE INSURANCE POLICIES/ <u>Including your term or burial policies</u>	Bring your <b>entire policy</b> with you, including the application form you or your agent filled out.
	Y	N	PERSONAL PROPERTY	Personal property held as an investment such as gems, jewelry, coin collections, antique cars, etc.
	Y	N	LUMP SUM OR ONE-TIME PAYMENTS	Lump sum or one-time receipts, such as inheritances, capital gains, lottery winnings, victim's restitution, insurance settlements and other amounts not intended as periodic payments.
	Y	N	MORTGAGES OR DEEDS OF TRUST- <b>Does <u>not</u> include your primary residence.</b>	Mortgages or deeds of trust held by an applicant for another person or business