



REVERSE MORTGAGE BENEFIT Submission Checklist

Forms Automatically Printed from Online Application

- Intake Form (Please verify that your information is accurate)
- Third-Party Authorization Form (All applicants must sign and date)
- Hardship Affidavit (All applicants must sign and date)

Supporting Documentation You Need to Provide

- Copy of photo identification (Text and photo must be clear and legible)
- Copy of most recent property tax assessment
(Can be obtained from your county assessor's office)
- Copy of most recent statement from reverse mortgage servicer
- Copy of 2015 individual and business federal tax returns with all Schedules, W-2s and 1098/1099s (Must include signature and date)

Current Income Documents:

Provide the TWO (2) MOST RECENT that apply:

- Pay stubs
- Pension/Retirement Benefit Statements
- Social Security Benefit Statements (or most recent award letter)
- Disability Benefit Statements
- Foster Care Contract
- Rental Agreement, if receiving rent from a roommate
- Divorce Decree, if receiving alimony

IF SELF-EMPLOYED:

- 2016 Year-to-date Profit & Loss Statement (P&L) – Using OHSI form provided

**Please return all items on this checklist to your Intake Agency before the deadline.
Your completed application can be submitted via fax, mail, or a drop-box.**

MAIL / DROP BOX

Intake Agency Name, Attn: LPA
Intake Agency Address Line 1
Intake Agency Address Line 2
Intake Agency Address Line 3

FAX

Intake Agency Name
Attn: LPA Application

(xxx) xxx-xxxx