

## INTERVIEW CHECKLIST

Complex Code \_\_\_\_\_

Date \_\_\_\_\_

A personal interview is required in order to process an applicant for tenancy. This interview checklist will be used with all applicants to go over the application. All questions will be asked during the interview with the applicant(s) required to sign this form at the end of the interview.

This application is listed with \_\_\_\_\_ As head of household.

Is that correct?     Yes     No

	Name	Relationship to head	Birth Date	Age (optional)	Student Y/N
Head					
Co-T					
3.					
4.					
5.					
6.					
7.					
8.					

Have there been any changes in household composition in the last twelve months?     Yes     No

***If yes, explain:***

Do you anticipate any changes in household composition in the next twelve months?     Yes     No

***If yes, explain:***

Is this the entire household to occupy the unit?     Yes     No

***If no, please explain:***

As site/resident manager, I am making you aware that no one else can join the household without prior management approval. Do you understand this clearly?     Yes     No

Do you understand that if we discover during the verification process that others will be living in your household not listed on the application or on this interview checklist that is grounds to cancel your application?     Yes     No

Will all of the persons in the household be or have been full time students during five calendar months of this calendar year, or the upcoming calendar year at an educational institution (other than a correspondence school) with regular faculty and students?     Yes     No

***If yes, please explain:***

If yes, answer the following questions:

Are any full-time student(s) married and filing a joint tax return?  Yes  No

Are any student(s) enrolled in a job-training program receiving assistance under the Job Training Partnership Act?  Yes  No

Is the full time student a Title IV/TANF recipient?  Yes  No

Is the full time student a single parent living with his/her minor child and the parent and child are not dependants on another's tax return?  Yes  No

To be clear in regard to government definitions, we will now go over a checklist of household income and assets. Please answer yes or no to the following and if yes, provide the amounts. Do you or any family member have income from:

Social Security?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
SSI?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Pension/Annuity?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Veterans Benefits?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Disability?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Unemployment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Workmen's Comp?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
TANF/Public Assistance?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Employment?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Do you receive Alimony?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Are you entitled to receive Alimony?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Do you receive Child Support?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Are you entitled to receive Child Support?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Military Pay?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Net Income from Business?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Contributions (monetary or not) from Friends/Relatives/Etc?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Income from Assets?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Other Income?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
Long Term Medical Care Insurance Payments in excess of \$180/day	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$
**Grants or Scholarships?	<input type="checkbox"/> Yes	<input type="checkbox"/> No	\$

[\*\*Not included in calculating income, but may aid management in determining student status as well as financial ability to pay rent.]

Do you file Income Tax returns?  Yes  No

Please list total household income for previous year. \$ \_\_\_\_\_

If this differs from current year, please explain:

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Is any member of the household likely to receive income or assistance from someone who is not a member of the household as listed on Page 2?  Yes  No

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If yes, please explain:

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Is any member of the household expecting any changes to their current income information in the next months (seeking employment, child support, expecting a promotion etc? )  Yes  No

If yes, please explain: \_\_\_\_\_

**Do you or a family member have any of the following assets?**

Checking Accounts	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Stocks or Bonds	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Savings Accounts	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Mutual Funds	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Certificates of Deposit	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Trust Accounts	<input type="checkbox"/> Yes	<input type="checkbox"/> No
IRA	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Life Insurance	<input type="checkbox"/> Yes	<input type="checkbox"/> No
Other Retirement Funds	<input type="checkbox"/> Yes	<input type="checkbox"/> No	Real Estate	<input type="checkbox"/> Yes	<input type="checkbox"/> No

If Real Estate is owned, is it for sale?  Yes  No      Rented?  Yes  No      Sold?  Yes  No

Does anyone hold any personal property as an investment (antique cars, jewelry, coins, etc.)  Yes  No

Please explain: \_\_\_\_\_

Other Current Assets (Cash, etc.?)  Yes  No

Please explain: \_\_\_\_\_

Have any assets been disposed of within the past two years?  Yes  No

Please explain if any of the above assets are, or have been, held jointly: \_\_\_\_\_

Does any member of the household have an asset(s) owned jointly with a person who is NOT a member of the household as listed on page 2?  Yes  No

If yes, describe: \_\_\_\_\_

Compare income sources and amounts listed on the application to those listed on this interview and clarify any differences.

Compare asset sources and amounts listed on the application to those listed on this interview and clarify any differences.

Do you rent or own?  Rent  Own      How long lived there? \_\_\_\_\_

If currently a homeowner, have you given credit references inclusive of mortgage lender?  Yes  No

Give a current or previous landlord \_\_\_\_\_

Are you currently under eviction or have you ever been evicted?  Yes  No

If so, why: \_\_\_\_\_

If the tenant or co-tenant is under the legal age of 18, have they provided proof of emancipation?

Yes  No

Thank you for answering all of the above questions. You must now sign all required verification release forms. Once we have completed processing all paperwork, you will receive notice in writing of selection, rejection or waiting list status.

**Certification by Applicant(s)**

I/We certify that all questions on this interview checklist have been asked of me/us at my/our personal interview with management. I/We have understood and answered all questions. I/We have reviewed my/our answers on this checklist. I/We certify that all answers are true to the best of my/our knowledge and that any misrepresentation of information will lead to cancellation/rejection of my/our application.

\_\_\_\_\_  
(Signature of Tenant)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Signature of Co-Tenant)

\_\_\_\_\_  
Date

\_\_\_\_\_  
(Signature of Manager/Owner)

\_\_\_\_\_  
Date