



## 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 reverse mortgage promissory note (if available)
- Copy of most recent statement from reverse mortgage servicer
- Copy of most recent homeowner's insurance statement (if available)
- Copy of 2016 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
- Rental Agreement, if receiving rent from a roommate
- Divorce Decree, if receiving alimony
- Other income sources

#### IF SELF-EMPLOYED:

- 2017 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