A close-up of a certificate

Description automatically generated

**Instructions for Completing Tenant Income Certification**

The owner or an authorized representative should check the appropriate box for Initial Certification (move-in), Recertification (annual recertification), or Other. If Other, designate the purpose of the recertification (i.e., resyndication, a unit transfer, a change in household composition, or other reason).

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| --- | --- |
| *Current Date* | Enter the date. |
| *Move-in or Lease Renewal Date* | Enter the date the tenant has or will take occupancy of the unit or the lease renewal date. |

PART I: Address and Unit Information (Completed by tenant)

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| *Property Name* | Enter the name of the development. |
| *Address* | Enter the address of the building. |
| *Unit Number* | Enter the unit number. |
| *# of Bedrooms* | Enter the number of bedrooms in the unit. |

PART II: Household Composition (Completed by tenant)

List all occupants of the unit. State each household member's relationship to the head of household.

For example:

|  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |  |
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| |  |  |  |  |  |  | | --- | --- | --- | --- | --- | --- | | *H* | Head of Household | *S* | Spouse | *L* | Live-in Caretaker | | *A* | Adult Co-Tenant | *F* | Foster child(ren)/Adult(s) |  |  | | *C* | Child | *O* | Other |  |  | |  |

Enter the date of birth and write Y if the occupant is a fulltime student or "N” for each occupant.

*If there are more than eight (8) occupants, use an additional sheet of paper to list the remaining household members and attach it to the certification.*

Part III. Gross Annual Income (Completed by tenant)

*Note to owners: See HUD Handbook 4350.3 for complete instructions on verifying and calculating income, including acceptable forms of verification.*

Enter the gross amount anticipated to be received for the 12 months from the effective date of the (re)certification. Complete a separate line for each income-earning member. List the respective household member number from Part II.

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| *Column (A)* | Enter the annual amount of wages, salaries, tips, commissions, bonuses, and other income from employment; distributed profits and/or net income from a business. |
| *Column (B)* | Enter the annual amount of Social Security, Supplemental Security Income, pensions, military retirement, etc. |
| *Column (C)* | Enter the annual amount of income received from public assistance (i.e., TANF, general assistance, disability, etc.). |
| *Column (D)* | Enter the annual amount of alimony, child support, unemployment benefits, or any other income regularly received by the household. |

Add the rows to get a total for each column, and then add the totals of each column to get (E) TOTAL INCOME.

Attach a copy of documentation for all income sources (e.g., paycheck stubs or social security benefit letters). If you need help determining what documentation to include, contact your owner or owner representative.

Part IV. Income from Assets (Completed by tenant)

*Note to owners: See HUD Handbook 4350.3 for complete instructions on verifying and calculating income from assets, including acceptable forms of verification.*

List the gross amount anticipated to be received during the 12 months from the effective date of the certification. List the respective household member number from Part II and complete a separate line for each member.

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| *Column (F)* | List the type of asset (i.e., checking account, savings account, etc.). |
| *Column (G)* | Enter the anticipated annual income from the asset (i.e., savings account balance multiplied by the annual interest rate). Anticipated income is the market value multiplied by the interest rate for the asset. |

Add the rows in column (G) to get (H) TOTAL INCOME FROM ASSETS.

Add (E) TOTAL INCOME and (H) TOTAL INCOME FROM ASSET to get (I) TOTAL HOUSEHOLD INCOME FROM ALL SOURCES.

Attach a copy of documentation for all income sources.

Household Certification and Signatures (Completed by tenant)

After all verifications of income and/or assets have been input, each household member age I8 or older must sign and date the Tenant Income Certification. For move-in, it is recommended that the Tenant Income Certification be signed no earlier than five (5) days prior to the effective date of the certification.

Part V. Determination of Income Eligibility Worksheet (Completed by owner/representative)

All income sources documented by the tenant(s) should first be verified.

Select which income restriction the unit is designated for.

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| --- | --- |
| *Household Size Determined from PART II* | Write the number of household members documented. |
| *Household Income at Move-In* | This is for recertification only. Enter the household income from the initial move-in certification. |
| *Current Income Limit per Family Size* | Enter the Current Move-in Income Limit for the household size at the designated income limit for that unit. These limits have been posted for the current year on engagekingston.com/kingston-forward. |
| *Total Annual Household Income from All Sources (I)* | Enter the number from PART IV (I). |
| *Household Meets Income Restriction* | Compare the Current Income Limit per Family Size and (I) to determine if the household is over the income restriction for this unit. Please note that even if (I) is over the Current Income Limit per Family Size, a household may still meet the income restriction if (I) is equal to or under 120% of the household’s (I) at their move-in. |

Part VI. Rent (Completed by owner/representative)

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| *Tenant Paid Rent* | Enter the amount the tenant pays toward rent. |
| *Utility Allowance* | Enter the utility allowance. If the owner pays all utilities, enter zero. If tenant pays all utilities, refer to the utility allowances posted on engagekingston.com/kingston-forward. |
| *Other non-optional charges and*  *mandatory fees* | Enter the amount of non-optional charges, such as mandatory garage rent, storage lockers, charges for services provided by the development, etc. |
| *Gross Rent for Unit* | Enter the total of the tenant paid rent plus utility allowance and other non-optional charges. |
| *Unit Meets Rent Restriction at* | Check the appropriate rent restriction that the unit meets according to what is required by the minimum set-aside(s) for the project. Refer to the rent limits posted on engagekingston.com/kingston-forward. |

Signature of Owner/Representative

It is the responsibility of the owner or the owner's representative to sign and date this document immediately following execution by the resident(s). The responsibility of documenting and determining eligibility (including completing and signing the Tenant Income Certification form) and ensuring such documentation is kept in the tenant file is extremely important. By signing this document, the Owner or Owner Representative confirm they have verified the household income and that the unit is compliant with the City of Kingston Affordable Housing Standards.