

## CHECKLIST FOR FINANCIAL INTERVIEW

CLIENT'S NAME: \_\_\_\_\_ DATE: \_\_\_\_\_

LAST DATE RECEIVED FINANCIAL ASSISTANCE: \_\_\_\_\_

	New or Returning Signature Page Form or Application Signed
	Current Release Form
	Current Texas Photo ID
	Social Security cards or tax return - all members of Household
	Proof of Income - paystubs, Student ID, Letters, TWC, etc. – for all adults
	<input type="checkbox"/> Lifetime Limit Cap <input type="checkbox"/> Previous awards <input type="checkbox"/> Available Balance
	Proof of rent/mortgage past due and amount
	W9 from landlord for rental assistance
	Proof of utilities past due and amount
	Additional pledge or payment due Amount
	Other: _____

Completed by: \_\_\_\_\_

Revised: 2-2020