SSI Income/Resource Worksheet

(If the income/resource does not apply, write N/A)

|  |  |
| --- | --- |
| **Name:** | |
| **DOB:** | **SSN:** |
| **Application date:** | |
|  | |
| **Income** | |
| **Type** | **Date Submitted** |
| Earned | |
| Wage stubs |  |
| Tax return |  |
| Unearned | |
| Benefit letter |  |
| Court orders |  |
| Alimony/child support receipts |  |
| Bank statements (interest) |  |
| Dividends/royalties |  |
| Rental/lease income |  |
| **Resources** | |
| **Type** | **Date Submitted** |
| Vehicles owned\* |  |
| Houses owned\*\* |  |
| Other property owned |  |
| Life insurance policies |  |
| Bank statements |  |
| Investment statements |  |
| Savings statements |  |
| Burial expense set-aside |  |
| Cemetery lot, crypt, etc. |  |
| *\* One automobile is fully excluded from resources if it is used for transportation of the individual or a member of the individual’s family. Applicants do not need to document that the vehicle will be used for certain specified purposes (e.g., medical treatment or essential daily activities).*  *\*\* A house that a person owns is excluded if the individual lives in it.* | |