



# Housing and Economic Empowerment (HEE) Checklist

Once you have your documents and are ready to provide those items please call 215-468-1645 x7005 to either schedule an appointment or to make arrangements for online submission with our intake team.

**\*\*You will not be scheduled with a Housing Counselor until all required documents are received\*\***

<p style="text-align: center;"><b>All client <u>must</u> provide the following documents...</b></p> <ul style="list-style-type: none"> <li><input type="checkbox"/> <b>Intake Packet</b> <ul style="list-style-type: none"> <li>- Please let us know if you have completed an intake packet within the last 12 months</li> </ul> </li> <li><input type="checkbox"/> <b>Current Photo Identification</b> <ul style="list-style-type: none"> <li>- Driver's License or State Photo ID Card</li> </ul> </li> <li><input type="checkbox"/> <b>Original Social Security Card(s)</b> <ul style="list-style-type: none"> <li>- ALL household members</li> <li>- <i>An application receipt from social security for a replacement card will be accepted if dated within 30 days of appointment.</i></li> </ul> </li> <li><input type="checkbox"/> <b>Proof of household income</b> <ul style="list-style-type: none"> <li>- Paystubs for previous 30 days and/or current year social security award letter and/or zero income form</li> </ul> </li> <li><input type="checkbox"/> <b>Last two (2) Bank Statements</b> <ul style="list-style-type: none"> <li>- Checking and/or savings accounts</li> </ul> </li> <li><input type="checkbox"/> <b>Tax Return and W2's for previous two (2) years (if applicable)</b></li> <li><input type="checkbox"/> <b>Household Expenses (as applicable)</b> <ul style="list-style-type: none"> <li>○ Utility Bills (gas/water/electric/oil)</li> <li>○ Credit Card Statements</li> <li>○ Cable/Internet/Phone</li> <li>○ Student Loans</li> <li>○ Transportation (Car Loan Statement/Public Transit)</li> <li>○ Cell Phone</li> <li>○ Insurance (Life, Car, Renter, Homeowners)</li> </ul> </li> </ul>	<p style="text-align: center;"><b>If you are seeking First Time Homebuyer Counseling...</b></p> <p>Please provide the following if already received:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Pre-approval/pre-qualification letter</li> <li><input type="checkbox"/> Loan estimate</li> <li><input type="checkbox"/> Purchase agreement/contract</li> </ul> <hr/> <p style="text-align: center;"><b>If you are seeking Mortgage Delinquency or Foreclosure Counseling...</b></p> <p>Please provide the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Hardship Letter</li> <li><input type="checkbox"/> Most recent mortgage statement</li> <li><input type="checkbox"/> Deed</li> <li><input type="checkbox"/> Act 91 or Act 6 (if applicable)</li> <li><input type="checkbox"/> Court Summons (if applicable)</li> </ul> <hr/> <p style="text-align: center;"><b>If you are seeking Rental Counseling...</b></p> <p>Please provide the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Current Lease</li> <li><input type="checkbox"/> Receipt for last payment or ledger</li> <li><input type="checkbox"/> Eviction notice (if applicable)</li> <li><input type="checkbox"/> Court Summons (if applicable)</li> </ul> <hr/> <p style="text-align: center;"><b>If you are seeking Tax Delinquency or Tax Foreclosure Counseling...</b></p> <p>Please provide the following:</p> <ul style="list-style-type: none"> <li><input type="checkbox"/> Deed</li> <li><input type="checkbox"/> Tax Bill</li> <li><input type="checkbox"/> Court Summons (if applicable)</li> <li><input type="checkbox"/> Sheriff Sale Notice (if applicable)</li> </ul>
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