

# Income documentation guide

A quick review of the documents you  
can provide to help us verify your income

# 2



It's important to provide proof of your current income. Let's look at the documents to include with your application.



**HAVE QUESTIONS?**

Don't hesitate to reach out to your Home Preservation Specialist for help!

# Income documentation

Answers to the following questions will help you quickly identify the documentation you'll need to include with your application.

Please provide the required documentation for all the income you want us to consider for your assistance application. This may also include documents from the co-borrower and any other contributors. If you have a co-borrower who's not participating in your request for assistance, your Home Preservation Specialist can tell you what documents you will need to submit.

**Are you employed?**

**Are you unemployed?**

**Are you self-employed?**

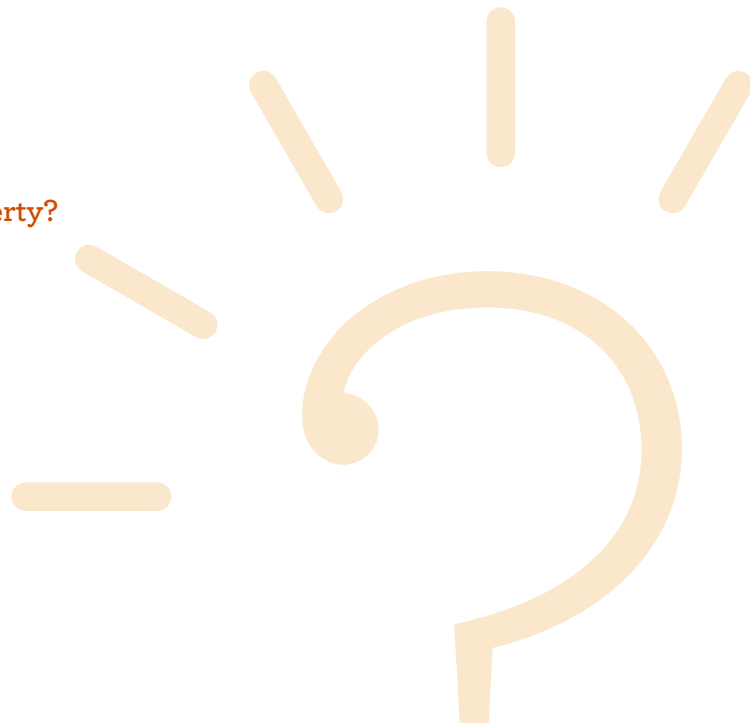
**Are you retired?**

**Are you divorced or separated?**

**Do you have rental income?**

**Are you receiving other income?**

**Do you have additional mortgages with us on this property?**



Use this document as your worksheet. See the situations that describe you, then check the boxes for the documents you'll need to submit. You'll be able to gather the right materials before you submit your application.

Are you a Wells Fargo checking account customer? We can provide bank statements for you. Contact us to learn how.

## I'm employed

### What documents do I need to submit?

- Most **recent paystub** and documentation of your year-to-date earnings if they're not on the paystub
- Or **two most recent bank statements** showing income deposit amounts

### What if I'm new at my job or I can't provide paystubs?

Your employer will need to verify your employment. Ask your Home Preservation Specialist for the appropriate form.

## I'm unemployed

Talk with your Home Preservation Specialist about your income and assistance status.

## I'm self-employed

### QUICK TIP

For a profit and loss statement template, see Documents and Forms on [wellsfargo.com/homeassist](https://wellsfargo.com/homeassist).

Please include business expenses and exclude personal expenses.

### What documents do I need to submit?

- Two most recent bank statements** showing self-employed income deposit amounts
- Or most recent signed and dated quarterly or year-to-date **profit and loss statement**
- Or most recent complete and signed **business tax return**
- Or most recent complete and signed **individual federal income tax return**

## I'm retired

### What documents do I need to submit if I'm receiving income from Social Security or pension plans?

- Two most recent bank statements** showing deposit amounts
- Or **award letters** or other documentation showing the amount and frequency of the benefits

## I'm divorced or separated

### IMPORTANT NOTE

You're not required to reveal your alimony, child support, or separate maintenance income if you don't want us to consider it for the application.



What documents do I need to submit if I'm receiving and choose to include alimony, child support, or separate maintenance income?

- Two most recent bank statements showing receipt of income
- Or other documentation showing the amount and frequency of the income

## I have rental income

### QUICK TIP

If you have rental income from more than one property, you'll need to print and fill out an additional Schedule of Real Estate Owned form and include it with your application.

You can find it under Documents and Forms on [wellsfargo.com/homeassist](https://www.wellsfargo.com/homeassist).

What documents do I need to submit?

- Two most recent bank statements showing receipt of rental income
- Or two most recent deposited rent checks

## I'm receiving other income

What documents do I need to submit if I'm receiving adoption assistance, disability or death benefits, housing allowance, public assistance or other income?

- Two most recent bank statements showing deposit amounts
- Or award letters or other documentation showing the amount and frequency of the assistance

## I have additional mortgages with Wells Fargo on this property.

What documents do I need to submit?

- Talk with your Home Preservation Specialist

