



COUNSELING One on One CHECKLIST
Pre-Purchase- Face-to-Face Session

Client must provide the following documents **before** scheduling an appointment:

1. Identification (ID) and Social Security Card _____
2. 8 weeks of Pay Stubs _____, SSI Award Letter (if applicable) _____
3. 3 Years of Federal Tax returns with all Schedules _____
4. 3 Years of W2's _____
5. 401k statement (if applicable) _____
6. Child Support Documents (if applicable) _____
7. 6 months of Checking Bank Statements _____
8. 3 months of Savings Bank Statements _____
9. Credit Report with credit score _____ (from all 3 credit bureau's)
10. First Time Homebuyer Certificate (if applicable) _____

York Office will provide the following documents:

1. Intake form _____
2. Income / Expense Sheet _____
3. Sign and date 3 In 1 Form _____
4. Self-Assessment Form _____
5. Action Plan _____

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Pennsylvania Housing Finance Agency