

INVESTMENT VERIFICATION

Send To: _____

Applicant/Tenant: _____ Unit #: _____
Soc. Security #: _____
Property Name: _____
Address: _____

Type of Investment held (circle one):

IRA 401(k) Brokerage Annuity Mutual Fund Other _____

Account Number: _____

Current Value \$ _____

Cash Value (after surrender fees & penalties) \$ _____

Annual earnings or interest rate \$ _____ % _____

Does the holder have access to the funds? _____ YES _____ NO

Are regular withdrawals/payments being made? _____ YES _____ NO

If **YES** list gross amount: \$ _____

Frequency (i.e. weekly, monthly, yearly): _____

AUTHORIZED SIGNATURE

Print Name: _____ Title: _____

Signature: _____ Date: _____

Telephone: _____

RETURN TO: _____

--OFFICE USE ONLY--

Date Sent: _____

Date Received: _____

Comments: _____

