



Homeowner Assistance Program (HoAP) Adjusted Gross Income (AGI) Worksheet

FORM D2

An Adjusted Gross Income (AGI) Worksheet should be completed by each household member that does NOT file a tax return, but DOES receive earned or unearned income.

If 1040 tax document not available, please provide an explanation below. **(Include attempts made to obtain tax document.)**

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Applicant Name: <i>(Head of Household)</i>		Application ID #:	
Co-Applicant Name: <i>(If Applicable)</i>		Damaged Property:	
Name of Household Member: <i>Completing This AGI Worksheet</i>			

Section 1: Household Member Annual Adjusted Gross Income (AGI)

ANNUAL INCOME	Other Annual Income	Annual AGI Income
1. Wages, salaries, tips		
2. Interest income	Annual Tax Exempt Interest:	Annual Taxable Interest:
3. Dividend income	Annual Qualified Dividends:	Annual Ordinary Dividends:
4. Taxable refunds/ credits/offsets of state/ local income taxes		
5. Alimony received		
6. Business income (or loss)		
7. Capital gain (or loss)		
8. Other gains (or losses)		
9. IRA Distributions	Total Annual Amount:	Annual Taxable Amount:
10. Pensions and Annuities	Total Annual Amount:	Annual Taxable Amount:
11. Rental real estate, royalties, partnerships, S corporations, trusts, etc.		
12. Farm income (or loss)		
13. Unemployment compensation		
14. Social Security benefits	Total Annual Amount:	Annual Taxable Amount:
15. Other income	Type of Income:	
16. Subtotal (lines 1-15) ----->		
ANNUAL EXPENSES		Annual AGI Expenses
17. Educator expenses		
18. Certain business expenses		
19. Health savings account deduction		
20. Moving expenses		
21. Deductible part of self-employment tax		
22. Self-employed SEP, SIMPLE, and qualified plans		
23. Self-employed health insurance deduction		
24. Penalty on early withdrawal of savings		
25. Alimony paid		
26. IRA deduction		
27. Student loan interest deduction		
28. Tuition and fees		
29. Domestic production activities deduction		
30. Subtotal (lines 17-29) ----->		
31. Subtract line 30 from line 16. This is the Household Member's Annual Adjusted Gross Income (AGI) * ----->		

*The income inclusions and exclusions allowed under the IRS 1040 definition of income are subject to change from tax year to tax year. This worksheet is a general representation of the IRS Form 1040, and as such cannot reflect all updated inclusions and exclusions each tax year. The user is advised to consult the IRS Web site for the most current version of this form at www.irs.gov.

Section 2: Household Member Certification

Warning: Any person who knowingly makes a false claim or statement to HUD may be subject to civil or criminal penalties under 18 U.S.C. 287, 1001 and 31 U.S.C. 3729. Under penalties of perjury, I/we certify that the information presented above is true and accurate to the best of my/our knowledge and belief. I/We further understand that providing false representations herein constitutes an act of fraud. False, misleading or incomplete information may result in my ineligibility to participate in this program or any other programs that will accept this document. Title 18, Section 1001 of the U.S. Code states that a person is guilty of a FELONY if he/she knowingly and willfully makes a false statement to any department of the United States Government.

Household Member - Printed Name	Household Member - Signature	Date