

Required Document Checklist – Earn to Learn Application

Please check Earn to Learn's eligibility requirements to see if you may qualify at earntolearn.org/eligibility

Please read through this entire packet carefully. If you are having trouble with a certain document, please contact Earn to Learn Staff.

Earn to Learn's application process verifies that applicants meet multiple eligibility requirements, including household income and assets. The items in the checklist below are required for your Earn to Learn application. Documentation that is not listed below may also be required to complete an application (such as debt statements, signed/dated personal statements, and employment letters).

- Applicant's Social Security Card
- Applicant's State Issued Photo ID (expiration date must be at least 90 days after interview)
 - o Note: school IDs are not accepted
- Federal Tax Return – Form 1040, 1040A, or 1040EZ and all attachments / schedules for the most recent year, for each person in the household who filed taxes
- For each business owned, provide the most recent Balance Sheet and Profit & Loss Statement (If someone in your household is self-employed, please inform Earn to Learn Staff. Additional forms may be required.)
- Award letter – If any of the following monthly benefits are received by any household member(s):
 - o Unemployment
 - o Veteran's Benefits
 - o Child Support
 - o Spousal Support
 - o Social Security (disability, retirement, supplemental, or survivors)
 - o Temporary Assistance for Needy Families (TANF)
 - o Per Capita Gaming Revenue

The following documents must be dated within 30 days of your interview.

- Household Information Form (attached)
- Pay Stub – Most recent for *one person* indicated on the Household Information Form who is employed
- Income & Tax Return Affidavit (attached) – For each person in the household age 18 or older who does not receive income and/or did not file taxes in the most recent year
- Account Statements – Most recent statements for all household members listed on the Household Information Form who have an account(s). This includes all prepaid cards, checking, saving, investment, and retirement accounts. Account statements must include:
 - o Bank / Credit Union Name
 - o Account Owner Name
 - o Current month's date
 - o Current balance
 - o Last 4 digits of the account number
- Debt Statements – Most recent mortgage and/or car loan statements, if applicable to your household



How to Submit Required Documentation (choose one):

- 1- Bring documents in person to your Eligibility Appointment.
- 2- To securely send sensitive personal information via email, we require you to use SendInc. To do this, create your own free account at www.sendinc.com and send to Earn to Learn Staff through this site.
- 3- Fax them to 877-266-0662. Include a cover letter with your first and last name, phone number, total number of pages, and name of your Earn to Learn Staff contact.

Required Documents – Sending Secure Emails

The Earn to Learn Program and our staff is dedicated to ensuring each participant's privacy and confidentiality. Understanding that sensitive documentation is needed to income verify participants and households, as well as open savings accounts once participants enroll with Earn to Learn, we use an encrypted email service called SendInc.

To securely send sensitive personal information via email, we require you to use SendInc. Earn to Learn will only send documentation to participants with sensitive personal information, such as your Social Security number or date of birth, via SendInc. Upon receiving and opening one of these emails from Earn to Learn you will be required to create a SendInc account to view the information.

SendInc is free for our participants to use. Visit www.sendinc.com to create your account.

Privacy Disclosure

Why do we ask for all of these documents, and will I be required to submit more documents than initially required?

The Earn to Learn program serves low-to-moderate income households. We have to make sure that we are serving the families the scholarship was created for. If the required documentation that you submit to Earn to Learn indicates additional sources of income or assets, Earn to Learn may request additional documents. Earn to Learn will only ask for documents if they are required. It is the goal of Earn to Learn to work with the student and their family to qualify them for the program and not to find ways to disqualify them.

Why is everyone in the household who earns income required to provide information?

A household is defined as anyone living under the same roof sharing a living and eating space. Earn to Learn must consider all members living under the same roof as part of the applicant's household. Please reach out to Earn to Learn Staff if you are unsure of which household members to include on your application.

What happens with my documents once you receive them?

Earn to Learn stores all information and documents we collect in a secure database and server. The database and server are protected with industry-standard encryption and safeguards and cannot be accessed by anyone but Earn to Learn Staff. All Earn to Learn Staff have passed background checks and will not share your information with anyone for any reason. Any paper documents you provide us are stored securely in our offices until we have processed your application. Once your application is approved or denied, all paper documents are shredded.

Earn to Learn does not report to the Internal Revenue Service (IRS) or the Immigration and Naturalization Service (INS).



Household Information Form

PART I: Fill in the following information for the entire household

Full Legal Name (Refer to Government Issued Identification)	Age	Relationship to Applicant	Employed (Y/N)	Monthly Salary (\$)	Owns a Business* (Y/N)	Filed Taxes (Y/N)	Bank Accounts (Y/N)	Retirement Accounts (Y/N)	Investment Accounts (Y/N)
1.		Applicant							
2.									
3.									
4.									
5.									
6.									
7.									
8.									

*If you are self employed, answer Y for Employed and Y for Owns a Business. If you are an independent contractor (paid through a company), answer Y for Employed and N for Owns a Business.

PART II: Fill in the following vehicle information for the entire household

Year	Make	Model	Mileage	Is any money still owed on this vehicle? (Y/N)	Current Value **Use Trade-In Value from www.kbb.com
Vehicle #1					
Vehicle #2					
Vehicle #3					
Vehicle #4					

*For vehicles older than 1992, please use www.nadaguides.com

PART III: Fill in the following address information for the entire household

Applicant Physical Address: Street _____ City, State _____ Zip _____
 Mailing address if different from Physical Address: Street _____ City, State _____ Zip _____

PART IV: Signature

I, the Earn to Learn applicant, to the best of my ability, attest that the information I have entered on this form is accurate and true for my household.

Applicant Printed Name _____ Applicant Signature _____ Date _____
 Parent/Guardian Printed Name _____ Parent/Guardian Signature _____ Date _____
(If applicant is currently under the age of 18)

NOTE: If you have more than 8 household members or 4 vehicles, please utilize an additional copy of this form.



Income and Tax Return Affidavit

REQUIRED for all household members 18 years of age or older who:

- Did not file their own taxes for the most recent tax year AND/OR
- Do not receive income from any of the sources listed below

I, _____, hereby certify that (please check all that apply):
(Print Name)

- I did NOT file taxes for the most recent tax year.
- I do NOT individually receive income of any kind from any of the income sources listed below.

Income Sources

- Gross wages, salaries, overtime pay, commissions, fees, tips and bonuses
- Net income from operation of a business or from rental or real personal property
- Interest, dividends and other net income of any kind for real personal property
- Periodic payments received from Social Security, annuities, insurance policies, retirement funds, pensions, disability or death benefits and other similar types of period receipts
- Lump sum payment(s) for the delayed start of a periodic payment
- Payments in lieu of earnings, such as unemployment and disability compensation, worker's compensation, and severance pay
- Public assistance payments
- Alimony and child support payments (whether through the court system or not)
- Regular pay, special pay and allowances of a head of household or spouse who is a member of the Armed Forces (whether or not living in the dwelling)
- Regular monetary gifts from family and/or friends
- Any other sources of income not listed above

Under penalty of perjury, I certify that the information presented in this certification is true and accurate to the best of my knowledge. The undersigned further understand(s) that providing false representations herein constitutes an act of fraud. False, misleading, or incomplete information may result in the termination of participation in the program.

Signature: _____ Date: _____

