

Retirement Savings Plan Verification

To: Name			From: Name	
Address			Address	
Email			Email	
Phone			Phone	
Fax			Fax	
Re: Name			Address	
Last 4 Digits of SS #				
Release: I hereby authorize the release of the requested in	nformation. Information	obtained und	ler this consent is limited to info	ormation that is no older than 12 months. There are
circumstances that would require the owner to verify info	rmation that is up to 5 y	ears old, which	ch would be authorized by me o	n a separate consent attached to a copy of this consent.
Applicant/Tenant			Date	
ou do not have to sign this form if either the reque	esting organization o	r the organiz	ation supplying the informa	ation is left blank.
n strict confidence. We are required to complete our veri appears above. If you have any questions, please feel free	fication process in a sho	ort time period	l and would appreciate your pro	ig the household's eligibility for the program and will be kept ompt response. Return this form via email or fax number as it
nformation Being Requested: Does the holder have access to the lump sum amount?	□ Ves □ No		Type of account:	
Cash Value:*\$				
Cash Value is the current value less the cost to turn the ass	et into cash.			
s the applicant/tenant receiving periodic payments?	□ Yes □ No		If yes, what amount: \$	Frequency:
s this savings plan earning interest and/or dividends? this includes reinvested interest/dividends)	\square Yes \square No If yes, what amount:	\$		% Frequency:
Additional Remarks: (please indicate any anticipated cha	nges)			
Name / Title of Person Supplying Information			Organization	
Signature			Date	
Phone #	Fax #		Email Address	

Under penalties of perjury, I certify that the information provided herein is true and accurate to the best of my knowledge. The undersigned further understands that providing false representation herein constitutes fraud.



