

City of Lodi

2015 SHARE Application

Income Worksheet

Proof of Income Worksheet

GROSS Monthly Income of Household

AFDC/ TANF/Cal Fresh/SNAP \$ _____
 ___(Examples of documentation: Notice of Action; Computer Printout; Benefit Letter)

Child/ Spousal Support \$ _____
 ___(Examples of documentation: Divorce Decree, Agreement, Court Order Documents)

Disability/ Unemployment \$ _____
 ___(Examples of documentation: Agency Printout Verifying Amount)

Pensions/ Annuity/ 401K/ IRA \$ _____
 ___(Examples of documentation: Monthly/Quarterly Bank Statements; Bank/Agency Statement of Income)

Rental Property Income \$ _____
 ___(Examples of documentation: Bank Statements; Tax Return)

SSA/ SSI/ SSP \$ _____
 ___(Examples of documentation: Benefit Letter; Bank Statement; Check)

Stock/ Bond/Interest Income \$ _____
 ___(Examples of documentation: Monthly/Quarterly Bank Statements; Bank/Agency Statement of Income)

Wages/ Commissions \$ _____
 ___(Examples of documentation: Current Stubs Covering 2 Months Showing Gross Income; Bank Statements Covering 2 Months)

Other Income \$ _____
 ___(Please specify source and include proof of income)

Non-Cash Benefits \$ _____
 ___(Include non-cash benefits available for living expenses such as section 8 housing; housing compensation from employer or other sources. Examples of documentation include housing vouchers; contract agreements)

Total Income (All Sources) \$ _____

SHARE Program Requirements

- The City of Lodi utility account must be in your name and you must live at the address where the discount is received.*
- You must promptly notify the City of Lodi if you no longer qualify for the SHARE Program.
- You may not be claimed on someone else's tax return other than your spouse.
- You will routinely be asked to re-qualify for the program and will need to provide current proof of income.
- The discount only applies to residential metered rates.
- The City of Lodi reserves the right to deny applications with unverifiable income.
- You may be required to complete a survey of income and expenses application.
- "Gross Household Income" is defined as ALL money and non-cash benefits available for living expenses from all sources, both taxable and nontaxable, before deductions for ALL people who live in the home. This includes but is not limited to: wages, salaries and commissions; self-employment; child/spousal support; interest dividends or withdrawals from savings accounts, stocks and bonds or retirement accounts such as IRA and 401K accounts; stocks; bonds; business or rental income; support from family or friends; cash gifts; loans; lottery winnings; tax refunds; money from insurance policies or legal settlements; Social Security; retirement, Veterans, disability or unemployment benefits and workers compensation; AFDC; SSI; SSP; cash public assistance; food stamps and free housing or utilities; school grants, loans, scholarships or other aid.

* For sub-metered customers, your bill from your manager must be in your name.



SURVEY OF INCOME AND EXPENSES

You are being asked to complete the form because you have requested assistance through the SHARE program and it was reported that you have no proof of income or limited proof of income. The City of Lodi requires all adults (anyone 18 years and over) living in the household to report all sources of income. If an adult claims to have no proof of income or limited income less than expenses, this form must be completed so we can understand how you are meeting expenses. Please complete the information below:

Name and Address	
Name:	
Address:	

Section 1: Do you have sources of income you forgot to report?		
YES	NO	During the previous month have you been employed part time?
YES	NO	During the previous month have you been self employed?
YES	NO	During the previous month did you receive money from any work that you perform once in awhile, like yard work, child care, donating blood, etc?
YES	NO	During the previous month have you received any gifts of money from anyone? If yes, please list the name and phone number of the person who gave the gift:
YES	NO	During the previous month did you receive any of the following: (circle all that apply) <div style="display: flex; justify-content: space-between; font-size: small;"> Worker's Comp Unemployment Government Sponsored Benefits Child Support </div>
YES	NO	Did you receive any of the following: (circle all that apply) <div style="display: flex; justify-content: space-between; font-size: small;"> Annuity Payment Pension Tribal Casino Payments Rental Income Insurance Benefits </div>

Section 2: Are you spending your savings or borrowing money to cover your monthly expenses?		
YES	NO	Are you using savings or a home equity loan? If yes, how much?
YES	NO	Are you using some other asset? If yes, how much?
YES	NO	Are you borrowing from credit cards? If yes, how much?
YES	NO	Are you borrowing from another source? If yes, how much?

Section 3: Please tell us how you paid these monthky expenses during the previous months:			
Expense	Monthly Cost	How was this expense paid?	Is someone else pays for you, please complete:
Rent or Mortgage	\$		
Utility Bills	\$		
Food	\$		

Section 4: If none of the above applies to you, please explain how your monthly expenses were paid:

Signature

By signing this form, I affirm that I believe these facts are accurate and true. I give the City of Lodi my permission to verify this information.

Note: Title 18, Section 1001 of the United States Code, states that a person is guilty of a felony for knowingly and willingly making false or fraudulent statements to any department or agency of the United States.