



## Addendum to the Home Buyer Program Document Checklist

HouseKeys is the Administrator for multiple Cities, Municipalities, Counties and Agencies. Some may require more items than those listed on the Standard Home Buyer Document Checklist. Please look for the one you are applying for below to find out which **additional** items are required **and** ensure you submit them along with all the documents listed on the Standard Document Home Buyer Checklist with your application file/package by the deadline.

The items for ALL the adult household members need to be turned in even if they are not purchasing the home. All the documentation must be the most current for the time of submission. Outdated documentation is not acceptable and a new application package will need to be resubmitted by the initial deadline for each opportunity. Incomplete and outdated packages will NOT be processed.

**Caution:** Everyone must submit the all the documents on the **Standard Home Buyer Document Checklist** when your file is requested in addition to the ones listed here depending on the City you select.

**Check the box for the City you are Home Buyer Program you are applying for and submit the additional items listed for that particular city.**

**City of Morgan Hill**     **City of Campbell**

For Morgan Hill, Campbell and Santa Clara: Submit the most current **6 months of documents** instead of 3 months of the following:

- Paystubs
- Income Statements/Stubs
- Checking and Savings Statements
- Retirement accounts Statements
- All other Investment Account Statements, Stocks, bonds and mutual funds
- All Financial Accounts Statements (e.g. Venmo, Apple Pay, Paypal, etc.)
- **Exhibit A** - Explanation of Deposits Form **AND** paper trail for the past 6 months instead of three.

**City of Gilroy:** Only the items on the Standard Home Buyer Document Checklist.

Note: The City of Gilroy currently does not require Exhibit J: City Preferences.

**City of San Ramon:** Only the items on the Standard Home Buyer Document Checklist.

**City of Hayward and City of Menlo Park:** Appraisal for a home or real estate you own. The Appraisal should be from a California state licensed appraiser within 90 days of application. If the property is out of state, the appraiser needs to be licensed by that state.

## Addendum to the Home Buyer Program Document Checklist – Continued

### City of Santa Clara BMP Program

Submit the most current **6 months of documents** instead of 3 months of the following:

- Paystubs
- Income Statements/Stubs
- Checking and Savings Statements
- Retirement accounts Statements
- All other Investment Account Statements, Stocks, bonds and mutual funds
- All Financial Accounts Statements (e.g. Venmo, Apple Pay, Paypal, etc.)
- **Exhibit A** - Explanation of Deposits Form **AND** paper trail for the past 6 months instead of three.

**In addition, please submit the following items for the City of Santa Clara BMP Program:**

- In addition to the 3 last years of tax returns, the last 3 years of tax transcripts from the IRS.
- If Self Employed: Year-to-date Profit and Loss statement prepared and **signed by a CPA on their letterhead. (Self-prepared are not acceptable for this City)**
- Signed Formal Rental Agreement or Lease
- Documentation of last six to twelve months copies of shared utilities bills (at least 2 types)
- Permanent Residency Documentation: All members of Applicant's household must provide acceptable documentation in Program application to verify that they are permanent legal residents of the U.S: US Birth Certificate, US Passport, Permanent Resident Card, and other documentation from the federal immigration agency or a court order granting admission for permanent legal residency based on such status, temporary green cards of spouses. Additionally, please see the Application Guidelines for more information and requirements for household members without proof of permanent legal residency in the U.S.
- In addition, there will be a \$50.00 Application Fee (when the application is submitted to HK for initial review) and a \$500.00 Processing Fee (when the file is submitted to the Program Underwriter). Both fees are **not** refundable.

**Certification Signatures on the Next page**

## Addendum to the Home Buyer Program Document Checklist - Continued

### Certifications:

Yes, I/we the applicant(s) understand and agree that we must work quickly and diligently with the Administrator, Lender, Title Company, City and other agencies and submit the documentation requested by the deadlines. I/we understand that they have the right to request any additional documentation or updates as needed.

I/We certify that I/we are submitting all the items indicated on the **Standard Home Buyer Document Checklist** and the **Addendum to the Home Buyer Document Checklist** as applicable by the deadline. I/we also understand that if our application is incomplete or outdated it will not be processed.

I/we understand that ALL the documentation must be the most current for the time period requested. Outdated documentation is not acceptable. I/we understand that a new application file/package (forms, supporting documents on the checklists, or any additional documentation) will need to be resubmitted for each opportunity, by the deadlines. We/I understand and agree that if we fail to submit all the information and documentation requested on time, they will move on the next applicant immediately.

Date \_\_\_\_\_

Print Name \_\_\_\_\_

Applicant Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Co- Applicant Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Co-Applicant Signature \_\_\_\_\_

Print Name \_\_\_\_\_

Co-Applicant Signature \_\_\_\_\_

