



Updated 4/3/23

FINANCIAL ELIGIBILITY WORKSHEET

Please provide complete and accurate information below, as this will be used to determine whether you financially qualify for pro bono legal assistance. **We cannot assess your eligibility with incomplete information.**

Name: _____ Today's Date: _____

Date of Birth: _____

STEP 1: DOCUMENTS

Please provide a copy of your federal tax return (Form 1040) from the most recent tax year. You may redact your Social Security Number and bank information. Please make sure the tax return is not password protected. **If you have not filed a tax return, or if your current income is significantly different this year from your 1040, please let us know.**

STEP 2: ADDITIONAL INFORMATION

a. Are you (check one): b. You have _____ dependent(s). c. Do you have a car?

☐ Married ☐ Divorced

☐ Yes

☐ Single ☐ Separated

☐ No

☐ Widowed

d. Your rent/monthly mortgage payment is: \$_____

e. If you own real estate, the fair market value is: \$_____

f. Do you receive **monetary support** from a source other than professional income or government benefits (for example, family support, alimony, inheritance, trust fund)? If so, please state the source, the amount, and the frequency of payment. Attach additional pages if necessary.

g. List all **bank account balances** (do not provide account numbers). Attach additional pages if necessary.

Checking: _____

Savings: _____

Retirement: _____

Other: _____

h. List the total value of **other assets** not listed above (including stocks and money market funds): \$_____
Attach additional pages if necessary.