

Montgomery County Veterans Services Financial Application Packet

627 Edwin C. Moses Blvd., 4th Floor East Medical Plaza

Dayton OH 45417, Phone: 937-225-4801

To apply for financial assistance, you must have a copy of each item listed below. Call our office at 937-225-4801 to schedule a financial appointment AFTER you have obtained all items on the list below. You must bring a copy for our office of each item. These copies will not be returned to you and will become part of our file. Applications will not be taken or considered without the necessary documentation.

Your Name

Daytime Telephone

Address

Bring one copy of each of these items listed below to your appointment for our files:

1. A copy of this completed and signed cover sheet.
2. A copy of all your DD-214's (member 4 copy) – if you have applied for assistance from our office before, we will have your DD-214's on file and you do not need to bring them again.
3. A copy of proof of you being a bona-fide resident of Montgomery County for at least 90 days.
4. A copy of your current, valid Ohio identification (not expired)
5. A copy of your bank activity statement for all accounts for the last 60 days (must list veteran or spouse as account holder).
6. If you rent your housing, a copy of your current signed and dated lease, completed Landlord Ledger Form (attached), and Taxpayer Identification Form (attached).
7. If you have a mortgage for your housing, completed Mortgage Company Statement Form (attached), and Taxpayer Identification Form (attached).
8. If you have utilities (gas, electric, water) in your name, bring a copy of your latest bill for each.
9. A copy of all income for the last 30 days for the household. Documentation is required from income from employment, federal and state benefits, retirement, educational monies and any other income sources.

After you have obtained the necessary documents (and made a copy of each for our file), a staff person will meet with you, by appointment, to review your financial circumstances. Appointments are scheduled on a first-available basis for appointment time and staff person, you cannot select a staff person. If it is necessary for you to come back to complete a pending application, the staff person working on your application will schedule another appointment for you while you are in their office.

You must come to your appointment prepared to discuss what has taken place financially that caused you to need to apply for assistance. Applying for financial assistance is not an entitlement and you must demonstrate a documented need. Our staff person will evaluate your documented need and make a decision based on information provided and the policies of the commission. The staff person may partially or totally approve or deny your request, which completes that application. You may be required to obtain additional documentation, develop budgeting plans, complete an application for other agencies, or participate in other programs to complete your application for assistance. Incomplete applications will not be considered for assistance awards.

I understand and agree that the Montgomery County Veterans Service Center may make a thorough investigation of my financial circumstances, employment and income, housing, and utility services; and contact me at any later date for survey purposes. I hereby release you, your organization or others from any liability or damages which may result from this exchange of the information requested. I also certify that all statements contained herein or at any step of the application process are true, complete, and correct to the best of my knowledge. I understand that knowingly providing false, misleading or incomplete information when applying for financial assistance may result in the denial of financial assistance now and in the future, required restitution, and subjection to criminal prosecution. LIFETIME LIMITATION FOR ASSISTANCE IS \$25,000 (Res. 17-032202). All assistance awards are based on eligibility and a demonstrated and documented need.

Applicant Signature

Date

8/2017