

CHC ANNUAL INCOME REVIEW FORM

Email: incomereview@wehc.com

SECTION 1: PRIMARY TENANTS CONTACT INFORMATION

Name (Adult Household Member):	Email:	SIN #:
Street Address:	Unit #:	Date of Birth: (mm/dd/yy)
Home Phone:	Cell Phone:	Are You Currently a F/T Student? YES <input type="checkbox"/> NO <input type="checkbox"/>
Emergency Contact Name:	Emergency Contact Cell Phone:	Relationship to You:

SECTION 2: HOUSEHOLD COMPOSITION (LIST OTHER HOUSEHOLD MEMBERS)

First Name	Last Name	Relationship	Date of Birth (mm/dd/yy)	Gender	F/T Student? If Yes, Confirmation Attached?
					YES <input type="checkbox"/> NO <input type="checkbox"/>
					YES <input type="checkbox"/> NO <input type="checkbox"/>
					YES <input type="checkbox"/> NO <input type="checkbox"/>
					YES <input type="checkbox"/> NO <input type="checkbox"/>
					YES <input type="checkbox"/> NO <input type="checkbox"/>

Has anyone moved in or out of your home in the last 12 months? YES NO

If yes, please provide details, including the name of the person, their date of birth, their relationship to you and the date they moved in or out of the residence

SECTION 3: STATUS IN CANADA

Is everyone in your household either a Canadian Citizen or Permanent Resident? YES NO

If no, please provide details of their status in Canada:

YOU MUST PROVIDE AN UP-TO-DATE LETTER FROM IMMIGRATION, REFUGEES AND CITIZENSHIP CANADA (IRCC) STATING THE CURRENT STATUS IN CANADA OF EVERYONE IN YOUR HOUSEHOLD WHO IS NOT A CANADIAN CITIZEN OR PERMANENT RESIDENT.

SECTION 4: INCOME – List ALL money received by you or anyone living with you. This may include, but is not limited to, the following:

<ul style="list-style-type: none"> • Employment (full time, part time, casual) 	<ul style="list-style-type: none"> • Old Age Security and Guaranteed Income Supplements (OAS/GIS/GAINS)
<ul style="list-style-type: none"> • Self-Employment or Business Income (Include the name of your business and the nature of your work) 	<ul style="list-style-type: none"> • Retirement Income Fund (RIF) Draws or Payments
<ul style="list-style-type: none"> • Ontario Works (OW) 	<ul style="list-style-type: none"> • Canada Pension Plan (CPP) and Other
<ul style="list-style-type: none"> • Ontario Disability Support Plan (ODSP) 	<ul style="list-style-type: none"> • Life Income Fund (LIF) Draws or Payments
<ul style="list-style-type: none"> • Employment Insurance (EI) 	<ul style="list-style-type: none"> • Workplace Safety Insurance Board (WSIB)
<ul style="list-style-type: none"> • Investment Income (i.e. interest/dividends) • Immigration Sponsorship 	

If you receive **Ontario Works** or **ODSP**, you must provide your **Statement of Assistance**, showing the amount of your social assistance and the names of everyone included in your benefits.

If your income has changed in the last 12 months or if the income declared below is very different from the net income amount on your NOA, please provide current proof of monthly income. For example:

- Pay stubs, letter from employer showing gross monthly income
- Service Canada statements for OAS, GIS, CPP or Employment Insurance
- Statements from the source of income for WSIB, private pensions, insurance benefits

LIST ALL INCOME

Name of Person with Income	Type of Income	Monthly Income Before Taxes	NOA
		\$	YES <input type="checkbox"/> NO <input type="checkbox"/>
		\$	YES <input type="checkbox"/> NO <input type="checkbox"/>
		\$	YES <input type="checkbox"/> NO <input type="checkbox"/>
		\$	YES <input type="checkbox"/> NO <input type="checkbox"/>
		\$	YES <input type="checkbox"/> NO <input type="checkbox"/>

REQUIRED

Have you received any Registered Disability Savings Plan payments in the last 12 months? YES NO

SECTION 5: ASSET SELF-DECLARATION

For Rent Geared-to-Income (RGI) Eligibility (as per City of Windsor, Housing Services - Local Housing Directive 2023- 3 – Asset Limits)

Asset Limits:

Total eligible assets must not total more than \$100,000 per single person household or \$150,000 per family/benefit unit of two or more. Assets must be declared for every member of the household who is 16 years of age or older with the exception of dependent children under the age of 18 and attending primary or secondary school.

Income-Producing Assets:

If the asset produces a regular income, that income must be included in the RGI calculation (e.g., annuities, GICs, bonds, interest from bank accounts, dividends from equities). This does not include any increase in value of the asset, only regular income provided by the asset.

Include Canadian and Foreign:

- Chequing and savings accounts
- Investment accounts (do not include RRSP, RDSP, RRIF and RESP)
- Annuities (income-producing)
- Guaranteed Investment Certificate (income- producing)
- Real estate (including residential, rental, commercial, recreational properties, farms and vacant land) (Note that residential properties suitable for year-round occupancy must be disposed of within 6 months from the start of the RGI tenancy)
- On-road vehicles if greater than one per household member of driving age
- Recreational vehicles (e.g., campers, trailers, all-terrain vehicles, off-road motorbikes, etc.)

Do not Include:

- Compensation plans as outlined in Appendix A
- On-road motor vehicles if equal or less than one per household member of driving age
- Clothing, jewelry and other personal effects
- Furnishings in the accommodation including decorative or artistic items
- Tools of a trade
- Business assets
- Prepaid funerals
- Registered Retirement Savings Plans (RRSP)
- Registered Education Savings Plan (RESP)
- Registered Disability Savings Plan (RDSP)
- Cash surrender value of a life insurance policy
- Loan taken against a life insurance policy used for disability- related items/services
- Employment assistance under Ontario Works to be used for post-secondary education

LIST OF ASSETS

Household Member	Asset (see list of included and excluded assets above)	Value/Balance	Income Producing Amount
	Total:		

Have you disposed of any assets in the last 12 months? YES NO

Have you obtained any new assets in the last 12 months? YES NO

Does anyone own property (i.e. House, cottage, trailer, etc.)? YES NO

If yes to any of the above questions, you must provide proof and details:

The Service Manager/ CHC may request additional documentation to verify this self-declaration.

I/WE ATTEST THAT THE INFORMATION PROVIDED ABOVE IS TRUE AND ACCURATE:

Tenant Name (All tenants over 16 years old unless attending primary or secondary school. Please print.)	Tenant Signature	Date (mm/dd/yy)

SECTION 6: COLLECTION, USE AND DISCLOSURE OF PERSONAL INFORMATION

Collection and Use of Your Personal Information for the following purposes:

- Considering your continued eligibility for RGI tenancy and calculating your rent
- Meeting legal and regulatory requirements arising out of or relating to your tenancy
- For the use of WECHC auditors to verify our financial records
- To contact necessary service or your next-of-kin in case of emergency

Disclosure of Your Personal Information for the purposes described above to the following parties:

- To the City of Windsor or any other government or social agency providing any form of assistance or subsidy to you under the Housing Services Act, the Ontario Works Act, 1997, the Ontario Disability Support Program Act, 1997, the Child Care and Early Years Act
- To the agent working on behalf of WECHC for the purposes of complying with the Housing Services Act, 2011
- To relevant agencies or next of kin in case of emergency
- To credit bureaus and other businesses that provide credit or rental history information about you

Appendix A – Excluded Assets

The following types of assets are not included when determining the total assets of the household:

Employment assets

- Tools of trade essential for continued employment
- Business assets necessary for the operation of a business, up to a maximum of \$20,000 per member and \$20,000 per business

Compensation payments

- An amount received as damages or compensation for:
 - Pain and suffering due to the injury or death of a household member
 - Expenses reasonably incurred as a result of the injury or death of a household member
- A government compensation payment received under any of the following schemes:
 - Helpline Reconciliation Model Agreement
 - Multi-Provincial/Territorial Assistance Program Agreement
 - Grandview Agreement
 - Ontario Hepatitis C Assistance Plan
 - 1986-1990 Hepatitis C Settlement Agreement
 - Walkerton Compensation Plan
 - Compensation for sterilization from the Government of Alberta
 - Extraordinary Assistance Plan (Canada)

Disability related funds

- The value up to a maximum of \$100,000 of the beneficial interest in trust of a member of the household who has a disability, if the capital of the trust was derived from an inheritance or the proceeds of a life insurance policy
- The value of funds held in a Registered Disability Savings Plan (RDSP), if the beneficiary of the plan is a member of the household
- The proceeds of the loan taken against a life insurance policy for disability related items or services

Educational assets

- That portion of a payment to be used for a member's post-secondary education that is received under the Ministry of Community and Social Services Act for the successful participation in a program of activities that assists with the successful completion of a high school diploma, the development of employment-related skills and the further development of parenting skills
- Registered Education Savings Plan (RESP) for a child of a member of the household

Retirement investments and savings

- The value of funds held by a member of the household in a:
 - Registered Retirement Savings Plan (RRSP)
 - Registered Retirement Income Fund (RRIF)
 - Locked-in Retirement Account (LIRA)
 - Life Income Fund (LIF) or Locked-in Retirement Income Fund (LRIF)
- A life or survivor annuity

Personal possessions

- Clothing, jewelry or other personal effects
- Furnishings, appliances, decorative and artistic items within the accommodation of the household; excluding anything used primarily for the operation of a business

Vehicles

- Motor vehicles that are not used primarily for the operation of a business, to a limit of one vehicle per household member of driving age

Other

- Prepaid funeral
- Cash surrender value of a life insurance policy up to \$100,000 for the household
- Saving initiatives/programs with contributions from the Service Manager