

Prosperity Savings Account Application

Required Documentation

The following documentation must be provided during your application appointment.

- Prosperity Account Application (There is no need for you to bring a hard copy, if you completed it online)
- Net Worth Assessment (This is not required if you are enrolled in TANF) (There is no need for you to bring a hard copy, if you completed it online)
- Most recent tax return (An actual copy of the tax return is required. A government transcript of a tax return does not contain the required information and will not be accepted.)
- Copy of social security cards, TCN, or green cards for *all household members* (“Household members” are defined by those listed on tax return)
- Copy of driver’s license or state identification (A driver’s license is required if you are saving for a vehicle)
- Copies of all Loan/debt statements from past 30 days (mortgage, vehicle, education, business loan, credit cards, personal loans, medical, past due utility bills, department store layaways, payday loans, etc.) These are used to verify your net worth. If you are eligible for TANF, you do not need to provide loan/debt statements.
- Proof of Income. Copies of paychecks or pay stubs or written statements from employers dated within the past 30 days, regarding employment from the within the past 30 days. (If self-employed, accounting and other business records showing net income must be provided)
- Current annual household budget which includes savings goal.
- TANF documentation – if applicable (If you are eligible for TANF, you do not need to provide loan/debt statements or a Net Worth Assessment.)
- Credit report from within the past 12 months. NOTE: Credit Report AND Credit Score are required for a Housing Prosperity Savings Account. A credit score is not required for education, small business and automobile Prosperity Savings Accounts.
 - If you need more information regarding getting a credit report with NO score, please go to www.consumer.ftc.gov and click on “Get Your Free Credit Report.”
 - If you need more information regarding getting a credit report with a score, please go to www.creditkarma.com or sign up for a Credit Café on the Prosperity Center’s website at www.uwfrederick.org/pc_education