

INSTRUCTIONS FOR COMPLETING THE INCOME AFFIDAVIT FORM

PLEASE ENSURE THAT YOU FILL OUT THE FORMS COMPLETELY, ACCURATELY AND LEGIBLY. USE BLUE OR BLACK INK ONLY



PERSONAL INFORMATION

PRINT THE FOLLOWING INFORMATION AT THE TOP OF THE FORM

Daytime telephone contact number: Example 718-555-5555

Development Name: Co-op City (Riverbay)	H081	OCCUPANTS' ANNUAL AFFIDAVI FOR CALENDAR		
Last Name - Head of Household:	Address:	Bldg.#:	Apt.#:	Daytime Telephone:



SECTION A – HOUSEHOLD INFORMATION

List all members of household and relationship currently residing in the apartment regardless of earning status. Example, if you have two residents, list head of household first, followed by other member:

JOHNSON, Doe Head of household Wife

Current Household Members
(Last Name, First Name)

A1. Head of Household
A2. A3. A4. A5.



Section A – HOUSEHOLD INFORMATION

- Enter for each resident:
 - Age 59
 - Social Security number 111-00-1111 Employed (YES/NO
 - Check the correct box of NYS Tax Return filed For each household member

Current Household Members Last Name, First Name)	Relationship	Age (ac of 12/31/2019)	Social Security Number	Employed Yes or No	Coss Income	Type of I (Comple	NYS Tax Retr	urn Filed Resider		
						JOHN	ii Addai	140116		
11.	Head of Household				\$					
12.										
13 .										
\4.										
15 .										
46.										



SECTION A - HOUSEHOLD INFORMATION RESIDENT INCOME TAX

You need a copy of your [current year] tax return so that you can report your gross income:

Step 1 – Refer to NY State [current year] Tax Form IT-201: **Go to line 19 and copy FEDERAL ADJUSTED gross income from line 19 to Income Affidavit form as Gross Income**

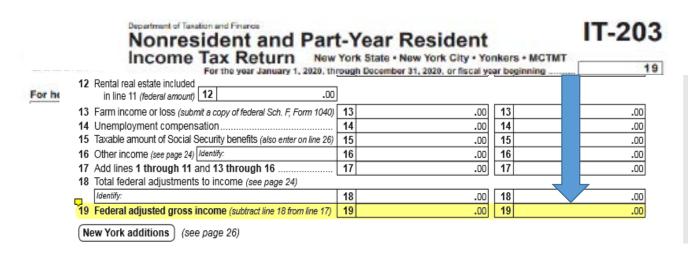
Resident Income Tax Return New York State • New York City • Yonkers • MCTMT	IT-201									
For the full year January 1, 2020, through December 31, 2020, or fiscal year beginning	19							T d	NVA T D	Ella d
For help completing your return, see the instructions, Form IT-201-1. Your first name Mi Your last name plant part generatum, error appears name on the below Your size of orth (mindayyyy) Your Social Se		Current Household Members	Relationship	Age (as of	Social Security	Employed Yes or No	Gross Income	(Comple	f NYS Tax Ret lete for each F	urn Filed Resident)
Tour size hains Mil Tour ast name for a joint retain, error spoose a name control below). Tour case of othin (principly). Tour case of othin (principly).	curity number	Last Name, First Name)		12/01/2019)	Humbu	100 01 110		Joint	Individual	None
		V1.	Head of Household				\$			
12 Rental real estate included in line 11	_	1							i 	1
13 Farm income or loss (submit a copy of federal Schedule F, Form 1040)	.00	12.								
14 Unemployment compensation	.00								il	iF
15 Taxable amount of Social Security benefits (also enter on line 27)	.00	\3 .							<u> </u>	
16 Other income (see page 16) Identify: 16	.00	14.								
17 Add lines 1 through 11 and 13 through 16	.00								₩	₩
18 Total federal adjustments to income (see page 16) Identify: 18	.00	\5.								
19 Federal adjusted gross income (subtract line 18 from line 17)	.00	16.								



SECTION A – HOUSEHOLD INCOME – NON RESIDENT INCOME TAX RETURN

You need a copy of [current year] tax return so that you can report your gross income.

Step 1 – Refer to NY State [current year] Tax Form IT-203. **Go to line 19 and copy FEDERAL ADJUSTED gross income from line 19 to Income Affidavit form as Gross Income**



Current Household Members Last Name, First Name)	Relationship	Age (as of 12/01/2010)	Social Security Number	Employed Yes or No	Gross Income	Type of I	NYS Tax Ret te for each R	urn Filed esident)
Cast Harre, First Harrey		·				Joint	Individual	None
M.	Head of Household				\$			
12.								
13 .								
14 .								
\5 .								
46.								



SECTION A – HOUSEHOLD INFORMATION

If you filed a joint return and have more than one wage earner, list each person's income separately so that the secondary wage earner's deduction can be calculated.

EXAMPLE: Doe and Dora are married and filed jointly and they both work, List as follows:

JOHNSON, Doe - \$90,000 (Gross Income)

JOHNSON, Dora - \$12,000 (Gross Income)

A7. TOTAL: ADD ALL LINES IN GROSS INCOME COLUMN: TOTAL IS \$90,000 + \$12,000 = \$102,000



GROSS INCOME

ENTER JOHNSON, Doe - \$90,000 (Gross Income)

JOHNSON, Dora - \$12,000 (Gross Income)

A7. TOTAL: ADD ALL LINES IN GROSS INCOME COLUMN: TOTAL IS \$90,000 + \$12,000

= \$102,000

Cu. ant Household Members (Last Name, First Tame)	Relationship	Age (ac of 12/31/2019)	Social Security Number	Employea 'es or No	Gross Income	Type of (Comple	NYS Tax Retu te for each R	ırn Filed esident)
(Last Haile, Flist Me)						Joint	Individual	None
A1.	Head of Household				\$			
A2.								
A3.								
A4.								
A5.								
A6.								
Section B: DEDUCTIONS B1. DEPENDENT EXEMPTIONS (As reported on IT-201 line \$.000 A7. TOTAL: Add all lines in GROSS INCOME column \$.000								

GROSS INCOME

IF EXTENSION OF TIME REQUESTED TO FILE, CHECK "NONE" AND ENTER ESTIMATED GROSS INCOME

If a [current year] NY State tax return was not filed, enter total income as "0."

Current Household Members (Last Name, First Name)	Relationship	Age (as of 12/01/2019)	Social Security Number	En., loyed Yes or lo	Gross Income	Type of I (Comple	NYS Tax Retu te for each Re	Filed et dent)
(Last Haile, First Haile)		,				Joint	Individual	None
A1.	Head of Household				\$			
A2.								
A3.								
A4.								
A5.								
A6.								
Section B: DEDUCTIONS B1. DEPENDENT EXEMPTIONS (As reported on IT-2 36 or IT-203 line 35)	01 line \$.000	A7. TOTA	L: Add all lines in GROSS INCO	OME column	\$			



SECTION B – DEDUCTIONS

Enter amounts of all personal exemptions, medical and dental expenses, and taxable social security benefits as instructed on the

form. If no deductions, enter "0."

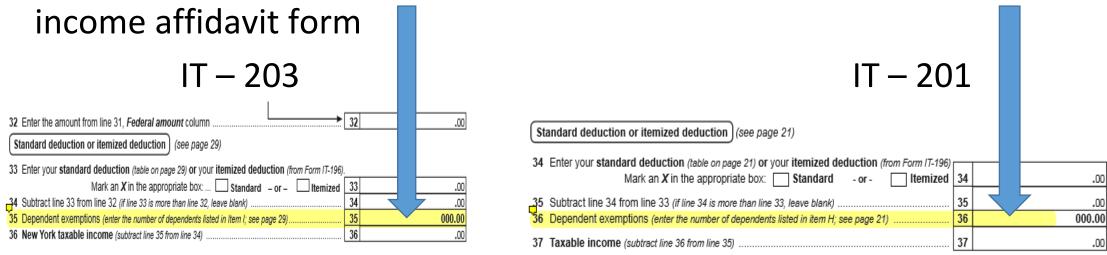
Section B: DEDUCTIONS 51. DEPENDENT EXEMPTIONS (As reported on IT-201 line 6 or IT-203 line 35)	\$,000
52. Allowances for PERSONAL EXEMPTIONS (Number of persons who filed a 2020 NYS tax return and were not laimed as a dependent by another taxpayer x \$1,000)	s	_,000
33. SUBTOTAL (Add lines B1 and B2)	\$,000
34. MEDICAL AND DENTAL EXPENSES (Only if itemized leduction is taken – as reported on IT-196, Resident Itemized Deduction line 1)		
55. TAXABLE SOCIAL SECURITY BENEFITS (As reported in IT-201 or IT-203 line 15 or total Social Security Benefits if 1020 NYS tax return was not filed.)		
86. TOTAL DEDUCTIONS (Add lines B3, B4, and B5)		
lote: You must attach copies of all 2020 NYS tax returns f by members of your household if: a Social Security number is not provided for each member.		old



DEPENDENT EXEMPTIONS – LINE B1

Refer to [current year] NYS TAX RETURN FORM IT – 201, LINE 36; OR IT 203, LINE 35

Copy the dependent exemptions reported on tax return form to



004000400004



ALLOWANCE FOR PERSONAL EXEMPTIONS LINE B2

Refer to [current year] NYS TAX RETURN AND do the following:

Insert the number of persons who filed a [current year] NYS tax return and were not claimed as a dependent by another taxpayer x \$1000.00 ON Line B2 on income affidavit: EXAMPLE: If number of dependents is 2 on Tax Return, multiply that number by \$1000.00; Total allowance is \$2,000.00

ENTER \$2,000 on Line B2
ADD LINES B1 AND B2 AND ENTER TOTAL
ON LINE B3

Section B1. DEPI 36 or IT-2	s	_,000	
B2. Allow of person claimed a	s	,000	
B3. SUB	TOTAL (Add lines B1 and B2)	\$_	,000
	ICAL AND DENTAL EXPENSES (Only if itemized is taken – as reported on IT-196, Resident Itemized in line 1)		
on IT-201	ABLE SOCIAL SECURITY BENEFITS (As reported or IT-203 line 15 or total Social Security Benefits if S tax return was not filed.)		
B6. TOTA	AL DEDUCTIONS (Add lines B3, B4, and B5)		
	u must attach copies of all 2020 NYS tax returns fi sers of your household if: a Social Security number is not provided for each member, the number entered on Line B3 is greater than the persons listed in Section A. or	house	



MEDICAL AND DENTAL EXPENSES

LINE B4 - Only if itemized deduction is taken – as reported on IT 196.

Resident itemized deduction line 1

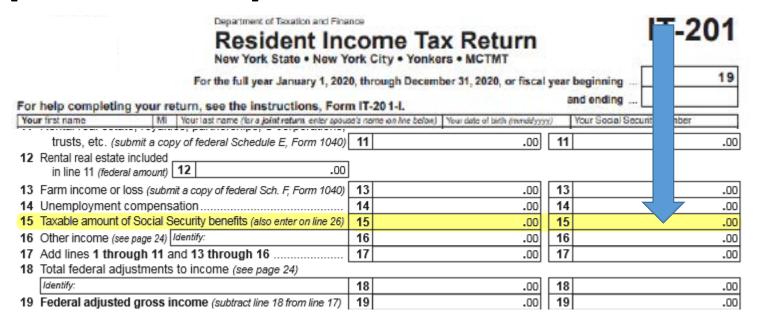
	n B: DEDUCTIONS	-	
	PENDENT EXEMPTIONS (As reported on IT-201 line -203 line 35)	\$_	,000
of perso	wances for PERSONAL EXEMPTIONS (Number ins who filed a 2020 NYS tax return and were not as a dependent by enother taxpayer x \$1,000)	s	,000
B3. SUI	BTOTAL (Add lines B1 and B2)	\$,000
deductio	DICAL AND DENTAL EXPENSES (Only if itemized on is taken – as reported on IT-196, Resident Itemized on line 1)		
on IT-20	(ABLE SOCIAL SECURITY BENEFITS (As reported of or IT-203 line 15 or total Social Security Benefits if y'S tax return was not filed.)		
B6. TO	FAL DEDUCTIONS (Add lines B3, B4, and B5)		
	ou must attach copies of all 2020 NYS tax returns fi abers of your household if:	led	
•	 a Social Security number is not provided for each member, 	house	hold
•	the number entered on Line B3 is greater than the persons listed in Section A, or	numb	er of
•	an amount is entered on Line B4 and/or B5.		



TAXABLE SOCIAL SECURITY BENEFITS

LINE B5 – AS REPORTED ON [CURRENT YEAR] NY TAX RETURN IT-201 OR IT-205, LINE 15, OR TOTAL SOCIAL SECURITY BENEFITS IF

[CURRENT YEAR] NYS TAX RETURN WAS NOT FILED



Section B: DEDUCTIONS B1. DEPENDENT EXEMPTIONS (As reported on IT-201 line 36 or IT-203 line 35)	s	,000
B2. Allowances for PERSONAL EXEMPTIONS (Number of persons who filed a 2020 NYS tax return and were not claimed as a dependent by another taxpayer x \$1,000)	\$_	,000
B3. SUBTOTAL (Add lines B1 and B2)	\$_	,000
B4. MEDICAL AND DENTAL EXPENSES (Only if itemized deduction is taken – as reported on IT-196, Resident Itemized Deduction line 1)		
B5. TAXABLE SOCIAL SECURITY BENEFITS (As reported on IT-201 or IT-203 line 15 or total Social Security Benefits if 2020 NYS tax return was not filed.)		
B6. TOTAL DEDUCTIONS (Add lines B3, B4, and B5)		
Note: You must attach copies of all 2020 NYS tax returns fi by members of your household if:	led	2000
 a Social Security number is not provided for each member. 	house	hold
 the number entered on Line B3 is greater than the persons listed in Section A, or 	numbe	er of
 an amount is entered on Line B4 and/or B5. 		



TOTAL DEDUCTIONS – LINE B6

- ADD LINE B3
- B4
- B5

AND INSERT TOTAL
DEDUCTIONS ON LINE B6

B1. DEP	B: DEDUCTIONS ENDENT EXEMPTIONS (As reported on IT-201 line 203 line 35)	s_	,000
of person	wances for PERSONAL EXEMPTIONS (Number ns who filed a 2020 NYS tax return and were not as a dependent by another taxpayer x \$1,000)	s	,000
B3. SUB	TOTAL (Add lines B1 and B2)	\$,000
	DICAL AND DENTAL EXPENSES (Only if itemized in is taken – as reported on IT-196, Resident Itemized in line 1).		
on IT-20	ABLE SOCIAL SECURITY BENEFITS (As reported 1 or IT-203 line 15 or total Social Security Benefits if 'S tax return was not filed.)		
B6. TOT	AL DEDUCTIONS (Add lines B3, B4, and B5)		
	ou must attach copies of all 2020 NYS tax returns fi bers of your household it:	led	
•	a Social Security number is not provided for each member,	house	hold
•	the number entered on Line B3 is greater than the persons listed in Section A, or	numb	er of
	an amount is entered on Line B4 andlor B5		

Attach a copy of [current year] NYS Income Tax return if Medical deduction and/or Social Security deduction is listed on B4 and/or B5.



Section C – DEPOSITION

<u>SECTION C: DEPOSITION – FORMS DO NOT NEED TO BE NOTARIZED.</u> Signed Affidavits, without notary acknowledgement, are acceptable.

		SECTION C: DEPOSITION	All Occupants 18 Y	ears of Age or older MUST Sign Deposition.
		State of New York County of	SS: The Undersigned, being duly s	swom, deposes and says:
		contents thereof: that the That (s)he understands the willful misrepresentation Social Security numbers Housing Finance Law; per income information sho accordance with the protent tenants are required to	said statement is true to the personal knowat: I may be cause for termination of the occup is are sought for use in verifying income into bursuant to the Privacy Act of 1974, disclos with on this affidavit is subject to verification visions of Section 171-b of the Tax Law; a	pancy agreement and/or civil or criminal penalties; rmation on this form pursuant to Section 60 of the Priv sure of Social Security numbers is voluntary; on by the NYS Department of Taxation and Finance
Sign here				State of New York, County of
if 18 years				Sworn to before me thisday of20 Notary Public
or older				



INSURANCE REQUIREMENTS

INSURANCE REQUIREMENT

- \$25,000 Personal Property
- \$2,500 Building property
- \$100,000 Liability protection
- \$1,000 Guest medical
- 12 months additional living expenses

Upload your insurance declaration page to the [current year] Income Affidavit Form.



SUBMIT INCOME AFFIDAVIT

			Ju l ⊭102	0		
Sunday	Monday	Tuesday	sday	Thursday	Friday	Saturday
			1	2	3	4
			Canada Day			Independence Day
5	6	7	8	9	10	11
12	13	14	15	16	17	18
19	20	21	22	23	24	25
26	27	28	29	30	21	

Completed Income Affidavit forms are due by **April 30, [current year].**

The completed form will be automatically sent to Riverbay Finance, so there's no need to drop off a paper copy.

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Development Name: DHCR No		DHCR Numb	OCCUPANTS' ANNUAL AFFIDAVIT OF HOUSEHOLD INCOME FOR CALENDAR YEAR [####]						Complete Affidavit and return by April 30, 2023 to:			
Last Name – Head of Household: Ad		Address:		TCode.#:	Bldg.#: Apt.#:		Daytime Telephone:					
SECTION A: HOUSEHOLD INFORMATION – List all members line 19 or Line 19A if applicable, and complete all columns. NOT	E: IF YOU	FILED A JOINT R	RETURN AND	HAVE MORE THAN ONE \	WAGE EARNER, LIST EA	ACH PERSON'S INC	OME SEPA	ARATELY S	SO THAT THE SEC	CONDARY	SECTION D: HOUSING COMPANY I	JSE ONLY
WAGE EARNER'S DEDUCTION CAN BE CALCULATED. If a PLEASE REFER TO "TENANT/COOPERATOR INSTRUCTION IN TRUCTION OF THE PROPERTY OF					le received. Fillit of type	all illiornation, exce	pt signature	es. FUR A	DUITIONAL ASSI	STANCE,	MONTHLY RENT/CC \$	
urrent Household Members		Relationship		Social Security		Gross Income		Type of NYS Tax Return Filed (Complete for each Resident)			ANNUAL RENT/CC (FOR CO-OP ONLY) EQUITY of \$x 6% (NOT TO INCLUDE	\$
(First Name Last Name) Print or Type – No Cursive Handwriting	Rolationomp		(as of 12/31/2023) Nu	Number	Yes or No	Gross most	Joint		Individual None		ACCRUED AMORTIZATION) (FOR CO-OP ONLY) NUMBER OF RENTAL ROOMS x \$120	\$
A1. Head of Household		f Household				\$					TOTAL	\$
A2.											ENTER APPLICABLE RATIO (7X or 8X)	
A3.											MAXIMUM INCOME LIMIT	\$
A4.											ADJUSTED HOUSEHOLD INCOME (Line A7 minus Line B6)	\$
A5.											SECONDARY WAGE EARNER(S) DEDUCTION (for each, \$20,000 or total wages if less)	\$
A6.											NET INCOME	\$
Section B: DEDUCTIONS B1. DEPENDENT EXEMPTIONS (As reported on IT-201 line 36 or IT-203 line 35)		8	A7. TOTAL: Add all lines in GROSS INCOME column \$							AMOUNT OVER INCOME	\$	
B2. Allowances for PERSONAL EXEMPTIONS (Number of persons who filed a 2023 NYS tax return and were not claimed as a dependent by another taxpayer x \$1,000)		\$	SECTION C: DEPOSITION All Occupants 18 Years of Age or older MUST Sign Deposition. The head of household hereby certifies that (s)he has read said statement of income and Household composition and knows the contents thereof: that the said statement is true to the personal knowledge of deponent.									
B3. SUBTOTAL (Add lines B1 and B2) \$		\$	PERCENTAGE OF SURCHARGE (per surcharge schedule)						%			
B4. MEDICAL AND DENTAL EXPENSES (Only if itemized deduction is taken – as reported on IT-196, Resident Itemized Deduction line 1)		 willful misrepresentation may be cause for termination of the occupancy agreement and/or civil or criminal penalties; Social Security numbers are sought for use in verifying income information on this form pursuant to Section 60 of the MONTHLY SURCHARGE to be billed \$										
B5. TAXABLE SOCIAL SECURITY BENEFITS (As reported on IT-201 or IT-203 line 15 or total Social Security Benefits if 2023 NYS tax return was not filed.)		Private Housing Finance Law; pursuant to the Privacy Act of 1974, disclosure of Social Security numbers is voluntary; income information shown on this affidavit is subject to verification by the NYS Department of Taxation and Finance in accordance with the provisions of Section 171-b of the Tax Law; and tenants are required to advise the housing company in writing within 90 calendar days of any additions or deletions to the household composition shown in section A above.										
B6. TOTAL DEDUCTIONS (Add lines B3, B4, and B5)		☐ I ele	ectronically certify under po	enalty of perjury that I h	ave read the forego					that I am familiar with the contents thereof, th		
Note: You must attach copies of all 2023 NYS tax returns filed by members of your household if: • a Social Security number is not provided for each household member,		ousehold	the age of 18, that I am the head, or co-head, or a member of the household for which this affidavit is submitted, and that the information electronically presented in the above affidavit, including household composition, age of occupants, and household income, is true to the best of my knowledge and belief. I understand that the information presented will become part of the records of the Riverbay Corporation and that Riverbay and New York State Homes and Community Renewal will rely upon said information to determine the amount of my annual maintenance charges. I further understand that any willful misrepresentation or false statement may be cause for termination of my occupancy agreement and my household's right to reside at Riverbay, and that I may be subject to civil or criminal liability for any willful misrepresentation or false statement.									
 the number entered on Line B3 is greater than the number of persons listed in Section A, or an amount is entered on Line B4 and/or B5. 		umber Of	Signature of Head of Household Signature (other occupant) Signature (other occupant)					Signature (other occupant)				
		Signature (other occupant) Signature (other occupant) Signature (other occupant)										

STATE OF NEW YORK	SECTION OF 94(1)(d) OF THE NEW YORK PUBLIC OFFICERS LAW REQUIRES THIS NOTICE TO BE PROVIDED WHEN COLLECTING						
PRIVACY NOTICE	PERSONAL INFORMATION FROM INDIVIDUALS						
AGENCY NAME	BUREAU/UNIT						
NYS DIVISION OF HOUSING AND COMMUNITY RENEWAL	Office of Integrated Housing Management						
TITLE OF OFFICIAL RESPONSIBLE FOR MAINTENANCE OF THE INFORMATION							
Director							
BUSINESS ADDRESS OF OFFICIAL							
641 Lexington , New York, NY 10022	Email: MLIncomeAffidavits@hcr.ny.gov						
AUTHODITY WILLOU DEDMITO THE MAINTENANCE OF INFORMATION							

AUTHORITY WHICH PERMITS THE MAINTENANCE OF INFORMATION

Private Housing Finance Law and Section 1727 of Title 9 of the Official Compilation of Codes, Rules and Regulations of the State of New York

THE CONSEQUENCES, IF ANY, OF NOT PROVIDING ALL OR ANY PART OF THE REQUESTED INFORMATION

Maximum Rental Surcharge and/or Denial of Succession Applications

THE PRINCIPAL PURPOSE(S) WITHIN THE AGENCY FOR WHICH THE INFORMATION IS TO BE USED

Determining Right to Continued Occupancy, Verification of Income for Purposes of Continued Occupancy and Establishing Rent, and Determination of Eligibility for Succession

(Current household members must be listed on affidavit to be eligible for succession rights.)

KNOWN OR FORESEEABLE TRANSFERS OF THE INFORMATION

New York State Department of Taxation and Finance, New York City Department of Housing Preservation and Development and Mitchell-Lama Housing Companies where transfer of such information is necessary to DHCR's statutory duties

EACH INDIVIDUAL HAS THE RIGHT TO REVIEW PERSONAL INFORMATION MAINTAINED BY THE AGENCY, UNLESS EXEMPTED BY LAW.



New York State
Division of Housing and Community Renewal
Office of Housing Operations
Website: www.hcr.ny.gov/ml