***Please provide this document ANY Beneficiary (foreign person whose green card is being filed) who is over the age of 18 and living in the U.S.; a separate document is required for each person***

**I-864 Financial Calculation - Beneficiary**

Beneficiary Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

Phone Number and email address:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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| --- | --- | --- | --- |
| No. | Income/Asset | Amount/Value | List of evidence – please provide these |
| 1. | Your current Wages/Income (including from any employment, business, etc.  List employer(s) or business(es) that you draw inform from and job title:  Employer: Job Title:  1. \_\_\_\_\_\_\_\_ 1. \_\_\_\_\_\_\_\_  2. \_\_\_\_\_\_\_\_ 2. \_\_\_\_\_\_\_\_  3. \_\_\_\_\_\_\_\_ 3. \_\_\_\_\_\_\_\_ | List amounts corresponding to each employer/business:  1. $\_\_\_\_\_\_\_\_  2. $\_\_\_\_\_\_\_\_  3. $\_\_\_\_\_\_\_\_ | -Pay statements for the present year (in case of a job)  -Job verification letter stating title, wages and if possible, stating that the job is a permanent job  -Payments from clients for the current year (in case of a self-employed contractor) |
| 2. | Income for the three past years (e.g. if you are filing this case in 2022, then the three past years will be 2021, 2020 and 2019). If you did not file tax returns, please write “0” and provide the reason (e.g. you were a student, or retired) | Past year 1:  Gross Income listed on tax returns (Adjusted Gross Income) $\_\_\_\_\_  If the tax returns were jointly filed, and includes the income of your spouse, then My income only in that’s year was $\_\_\_\_\_\_ (from my earnings per my W-2/1099s)  Past year 2:  Gross Income listed on tax returns (Adjusted Gross Income) $\_\_\_\_\_  If the tax returns were jointly filed, and includes the income of your spouse, then My income only in that’s year was $\_\_\_\_\_\_ (from my earnings per my W-2/1099s)  Past year3:  Gross Income listed on tax returns (Adjusted Gross Income) $\_\_\_\_\_  If the tax returns were jointly filed, and includes the income of your spouse, then My income only in that’s year was $\_\_\_\_\_\_ (from my earnings per my W-2/1099s) | -Prior 3 years tax returns or tax transcript and W-2s and 1099s. Transcripts for the last 3 years, you can obtain IRS Tax Transcripts here: <https://www.irs.gov/individuals/get-transcript> |
| 3. | Cash in bank currently (checking, savings) | $\_\_\_\_\_\_\_\_  Is this a joint account with the Petitioner?  Yes\_\_\_\_\_  No\_\_\_\_\_\_ | -Bank statements for the past 12 months |
| 4. | Stock, bonds, investments | $\_\_\_\_\_\_\_\_  Is this a joint account with the Petitioner?  Yes\_\_\_\_\_  No\_\_\_\_\_\_ | -Investment statements for the past 12 months |
| 5. | Real estate owned  List each property:  1. \_\_\_\_\_\_\_\_  2. \_\_\_\_\_\_\_\_  3. \_\_\_\_\_\_\_\_ | List amounts corresponding to each property:  1. Value: $\_\_\_\_\_  Mortgage balance: $\_\_\_\_\_  Is this a joint account with the Petitioner?  Yes\_\_\_\_\_  No\_\_\_\_\_\_  2. Value: $\_\_\_\_\_  Mortgage balance: $\_\_\_\_\_  Is this a joint account with the Petitioner?  Yes\_\_\_\_\_  No\_\_\_\_\_\_  3. Value: $\_\_\_\_\_  Mortgage balance: $\_\_\_\_\_  Is this a joint account with the Petitioner?  Yes\_\_\_\_\_  No\_\_\_\_\_\_ | -Ownership deed  -Current real estate tax bill  -Proof of real estate insurance  -Current mortgage statement  -If owned in a company name, then proof that you own the company (company tax returns, copy of a printout from the Secretary of State’s website where the company is established showing you and the owner) |