***Please provide this document for the Petitioner (U.S. family member who is the sponsor)***

**I-864 Financial Calculation - Petitioner**

Petitioner Name:\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_\_

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

|  |  |  |  |
| --- | --- | --- | --- |
| 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 any of the Beneficiaries?  Yes\_\_\_\_\_, which Beneficiary \_\_\_\_\_\_\_  No\_\_\_\_\_\_ | -Bank statements for the past 12 months |
| 4. | Stock, bonds, investments | $\_\_\_\_\_\_\_\_  Is this a joint account with any of the Beneficiaries?  Yes\_\_\_\_\_, which Beneficiary \_\_\_\_\_\_\_  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 jointly owned with any of the Beneficiaries?  Yes\_\_\_\_\_, which Beneficiary \_\_\_\_\_\_\_  No\_\_\_\_\_\_  2. Value: $\_\_\_\_\_  Mortgage balance: $\_\_\_\_\_  Is this jointly owned with any of the Beneficiaries?  Yes\_\_\_\_\_, which Beneficiary \_\_\_\_\_\_\_  No\_\_\_\_\_\_  3. Value: $\_\_\_\_\_  Mortgage balance: $\_\_\_\_\_  Is this jointly owned with any of the Beneficiaries?  Yes\_\_\_\_\_, which Beneficiary \_\_\_\_\_\_\_  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) |

**Please Note Regarding I-864 Sponsors:**

Every I-864 sponsor is required to report his/her change of address within 30 days of the change if the sponsorship agreement is still in force. The sponsorship agreement remains in force until the sponsored immigrant:

1. Becomes a U.S. citizen;

2. Receives credit for 40 quarters of work;

3. Departs the United States permanently and either formally abandons lawful permanent resident status (by filing Form I-407, Record of Abandonment of Lawful Permanent Resident Status) or is formally held in a removal proceeding to have abandoned that status;

4. In a removal proceeding, loses the lawful permanent resident status that the sponsored immigrant obtained based on your Form I-864; or

5. Dies.

**NOTE: Each sponsor must submit a separate Form I-865 to report an address change, even if sponsors share the same address.**