



United States Department of State  
Bureau of Consular Affairs

**Checklist – Guidelines for Preparing Affidavit of Support Forms –  
I-864, I-864EZ, I-864A, and I-864W**

**Important Notice For Sponsors: Follow Instructions for Affidavit of Support Forms.**

It is very important to follow the detailed instructions included with each form [I-864W](#), [I-864EZ](#), [I-864](#) and [I-864A](#) you download. These are fillable forms on your computer, and it is preferred that you type the form using CAPITAL letters. After the form is completed on the computer, it must be printed and mailed as instructed. The forms cannot be submitted on your computer.

Some procedures have changed, as highlighted in the Department of Homeland Security, [Fact Sheet: Affidavits of Support](#). Also review the [Frequently Asked Questions \(FAQ's\)](#).

Use these guidelines, with the corresponding checklist “boxes” below, when completing and assembling Affidavit of Support forms and documents, to ensure you are completing and submitting all required items. Affidavit of Support forms that are incomplete or have not been assembled correctly will not be accepted. (**Note:** This checklist and guidelines are for your personal reference. You do not need to return it with the completed Affidavit of Support forms and documents.)

**Who Needs an Affidavit of Support?**

This form is legally required for many family-based and some employment based immigrants to show they have adequate means of support, when planning to immigrate to the U.S. Generally, the following intending immigrants need an Affidavit of Support:

- Applicants for family-based immigrant visas, including certain orphans.
- Applicants for employment-based immigrant visas where a relative filed the immigrant visa petition or has a 5 percent or greater ownership interest in the business that filed the petition
- **Important Note:** For detailed explanation regarding who needs an Affidavit of Support, and who is exempt, see Page 1 of the Instructions for each form: I-864EZ, I-864, I-864A, and Form I-864W. Those who are exempt must complete I-864W.

**How to Get Started - Step-by-Step**

Step 1	Follow the instruction letter you received from the National Visa Center (NVC).
Step 2	Review this Checklist-Guidelines for Preparing the Affidavit of Support.
Step 3	Review the General Information and FAQ's.
Step 4	Download the Affidavit of Support forms <a href="#">I-864W</a> , <a href="#">I-864EZ</a> , <a href="#">I-864</a> , and <a href="#">I-864A</a> . Review instructions.
Step 5	Then, first determine whether the new I-864W (exemption form) or I-864EZ (short

	form) applies to your immigrant situation. If these forms don't apply then the I-864 is required, as well as I-864A, if applicable.
--	---

### I. Intending Immigrant's Affidavit of Support Exemption, Form I-864W

Certain classes of immigrants are exempt from the Affidavit of Support requirement. As a first step in the affidavit of support process, review the I-864W to determine whether the intending immigrant exemption applies. If yes, the I-864 is not required and, the intending immigrant (visa applicant) must file I-864W, Intending Immigrant's Affidavit of Support Exemption. (See Form I-864W for details.) In making this change, the affidavit of support requirement is eliminated in certain cases—such as:

- Sponsored immigrants who have, or can be credited with, 40 quarters of covered employment.
  - ❑ **As proof, you must attach a signed statement from the person who earned the quarters.**
  - ❑ **You must attach an earnings and benefits statement from the Social Security Administration (SSA) showing the number of qualifying quarters he/she has earned. To make a request to SSA use Form SSA-7004-SM, or in the U.S. call SSA's toll free number, 1 800-772-1213**
- Self-petitioning widow/widowers;
- Battered spouses of U.S. citizens and children of battered spouses of U.S. citizens
- Intending immigrant is a child, who will become a U.S. citizen immediately upon entry under the Child Citizenship Act of 2000 (CCA), meeting certain requirements;

### II. Petitioner's (sponsor) documents: Affidavit of Support, Forms I-864 or I-864EZ

In family-based immigrant cases, the petitioner or the relative who filed the petition must complete the Form I-864 or I-864EZ. The I-864EZ Affidavit of Support is a short form Affidavit of Support to be used by certain petitioning sponsors who rely **only upon their own employment** to meet the affidavit of support requirements. For employment-based immigrant cases, the person who has ownership interest (5% or more) in the petitioning company should complete the Form I-864. This is true even if a joint sponsor gives an affidavit of support.

- ❑ Put all pages in correct order and staple them together
- ❑ Fill out each page completely.
- ❑ Sign the form. In employment-based cases, the relative must sign (not required to be notarized)

**Family Members You are Sponsoring:** If the immigrant you are sponsoring is bringing a spouse and/or children to the U.S., all listed on the same petition and you are sponsoring them, and they are either traveling with the immigrant, or within six months of the immigrant's entry to the U.S., ensure you have listed them on the I-864 and I-864A, if needed. (See I-864 instructions, page 5, for more information.) You cannot complete the I-864EZ if you are also sponsoring family members, who are listed on the same petition.

**Federal Income Tax Return:** Include a photocopy or Internal Revenue Service (IRS) transcript\* even if you filed electronically, with all supporting schedules and/or W-2s for the most recent federal income tax return. **\*To request IRS-generated transcripts or copies of your tax return, visit the [IRS website](#).**

- ❑ The return must have all pages in the correct order and stapled together

- ❑ If you did not have to file a tax return, attach a written explanation and a copy of the instructions from the IRS publication that shows you were not obligated to file. For general information on income tax obligations, visit the [IRS](#) website

**Income Requirement** if you need assets to meet the minimum income requirement:

- ❑ Attach evidence of assets (\*) with a cash value that equals at least five times the difference between your total household income and the poverty guideline for your household size

**Example for a household size of 4\*\*:**

*125 percent of poverty guideline:	\$25,000
Sponsor's income:	<u>\$18,000</u>
Difference:	\$7,000
***Multiply by 5:	<u>    x 5</u>
Minimum required cash value of assets:	\$35,000

**Important Notes:**

(\*) Sponsors using assets to prove they can support the sponsored immigrant must use Form I-864. They cannot use Form I-864EZ.

(\*\*) The example uses the poverty guidelines for year 2006 where the sponsor is not living in Alaska or Hawaii. Please ensure you consult the governing poverty guideline year for your specific situation.

(\*\*\*) Sponsors of immediate relative spouses and children of U.S. citizens: Amount of required assets is reduced from five times to three times the difference between the governing poverty guideline and actual household income. Sponsors of orphans who will acquire citizenship after admission to the U.S. need only prove assets in the amount of the difference between the poverty guidelines and actual household income.

**Ensure all of the following are included:**

- ❑ Attach evidence of ownership, location and the value of each asset
- ❑ Attach evidence of liens, mortgages and liabilities (if any) for each asset
- ❑ Attach additional evidence, when annual income does not meet minimum income requirements. Evidence of current employment or self-employment includes, a recent pay statement or a statement from your employer on business stationery. The letter from your employer should show the beginning date of employment, type of work you do and how much money you make.

**III. Joint Sponsor's documents (if required)**

If a petitioner's income does not meet the 125% income requirement, a joint sponsor must complete a Form I-864. **Note: The petitioner must also submit a Form I-864 and cannot use Form I-864EZ if having a joint sponsor.**

- ❑ The Joint Sponsor is required to meet the same qualifications as the petitioner and submit the same documentation noted in **I. Petitioner's documents** (listed above) including federal income tax return and income requirements
- ❑ Proof of U.S. Citizenship or Permanent Resident status

**IV Household Member's documents**

You need a separate Form I-864A Contract Between Sponsor and Household Member for **each** household member whose income and assets are to be considered.

- ❑ Each page must be filled out completely and stapled together
- ❑ All tax, employment and asset documentation must be assembled in the same manner as in the **I. Petitioner's documents** (see above) and attach the Form I-864A
- ❑ The Sponsor must complete the appropriate sections (not required to be notarized)
- ❑ The household member must complete the appropriate sections (not required to be notarized)

**IMPORTANT NOTE:** The Affidavit of Support forms are no longer required to be notarized. You should know however, when signing the Affidavit for Support forms, you certify that the information provided, transcript and/or photocopy of tax documentation is true and correct, under penalty of perjury.

*(October 2006)*