

YOUR WORKING CHECKLIST

Organize financial affidavit records by person, source and period

How can I prepare financial records for an immigration support–affidavit review?

Keep the relevant person's role, income records, tax periods, assets or other requested evidence clearly labeled under the current official instructions. A support affidavit is not interchangeable with a fee-waiver request. This guide organizes records without determining a sponsor's eligibility, household size, required income or the sufficiency of an asset.

Check the boxes on screen or by hand. Use the notes area for records to find and questions to ask.

Your preparation checklist

- ☐ Identify each person's proposed role.
- ☐ Separate historical tax records from current facts.
- ☐ Keep assets and obligations identifiable.
- ☐ Distinguish a support affidavit from other financial tasks.
- ☐ Preserve privacy and the final reviewed version.

Notes and questions to follow up

Source links and current instructions

Sources checked October 25, 2026. Follow current instructions at the linked institution.

USCIS: I-864: Affidavit of Support

<https://www.uscis.gov/i-864>

USCIS: Policy Manual: evidence

<https://www.uscis.gov/policy-manual/volume-1-part-e-chapter-6>

Immigrant Insider: Editorial policy and verification status

<https://immigrantinsider.com/editorial-policy/>

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General information

This free organizer is not a government form and does not submit an application, establish eligibility, preserve a deadline or replace individual legal advice. Government filing fees and professional services are separate.