FREE CHECKLIST

I-864 Sponsor Checklist

The sponsor document set: taxes, income proof, household-size worksheet, joint sponsor package, and the asset math.

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Every family-based case needs a legally enforceable Form I-864 from the petitioner, and often a joint sponsor. This checklist covers the sponsor's document set, the household-size worksheet, the asset rules for closing an income gap, and the parallel set a joint sponsor must provide. The form itself is free ($0); consular cases add a $120 NVC review fee.

Sponsor's core document set

- [ ] Form I-864, signed — current edition, every item answered; Part 6 income figures must match the tax documents exactly
- [ ] Federal tax return for the most recent tax year — REQUIRED — complete copy with all schedules and attachments, or (better) an IRS tax return transcript
- [ ] Tax returns/transcripts for the 2 prior years — optional but recommended, especially if income fluctuates or barely clears the line
- [ ] W-2s and 1099s for every tax year submitted as a photocopied return (transcripts don't need them)
- [ ] If not required to file taxes in any year: a signed statement explaining why, citing the IRS filing threshold for that year and filing status
- [ ] Employment verification letter on company letterhead — job title, start date, annual salary, signed by HR/manager, dated within the last few months

- [ ] Pay stubs from the last 2–3 months (last 6 if hours vary)
- [ ] Self-employed sponsors: most recent Schedule C/E/F, current-year profit-and-loss statement, business license/registration, and business bank statements
- [ ] Other income proof if counted: Social Security award letter, pension statement, VA benefits, rental income (lease + Schedule E), alimony order
- [ ] Proof of sponsor's status: U.S. passport bio page, birth certificate, naturalization certificate, or green card (front and back)
- [ ] Proof of U.S. domicile if the sponsor lives or works abroad: evidence residence was maintained (U.S. lease/mortgage, U.S. bank activity, voting record, U.S. employer) or concrete steps to re-establish it before the immigrant's entry

Household size worksheet — count carefully

- [ ] Count: the sponsor (1) + sponsor's spouse + sponsor's unmarried children under 21 (even if living elsewhere) + anyone claimed as a dependent on the last tax return + the intending immigrant + any derivatives immigrating with them + anyone still covered by a prior I-864 the sponsor signed
- [ ] Do NOT double-count anyone who fits two categories
- [ ] Match the total against 125% of the current poverty guidelines on Form I-864P (2026 reference: about $27,050 for a household of 2, $34,150 for 3, $41,250 for 4 — always check the current I-864P; active-duty military sponsoring a spouse/child use 100%)
- [ ] Use "total income" from the most recent Form 1040 (line for total income) as the qualifying number — not gross pay, not take-home
- [ ] Pull copies of any prior I-864s the sponsor signed — those obligations may still be running and inflate household size
- [ ] Household member's income can be added with Form I-864A + that member's tax return, proof of income, and proof of residence with the sponsor (the intending immigrant's own income counts without an I-864A if it will continue from the same source after the green card)

Assets — closing an income shortfall

- [ ] Compute the shortfall: 125% guideline for your household size minus qualifying income
- [ ] Multiply: assets must equal 5× the shortfall — reduced to 3× when a U.S. citizen sponsors a spouse or a child over 18 (and 1× for certain orphan adoptions)
- [ ] Count only assets convertible to cash within 12 months without undue hardship
- [ ] Bank/brokerage accounts: 12 months of statements or a letter from the institution stating account age and current balance
- [ ] Real estate: recent professional appraisal + mortgage statement (only net equity counts) + proof of ownership
- [ ] Vehicles beyond the household's primary vehicle: title + market valuation
- [ ] The intending immigrant's own assets can be counted — same documentation standards, with translations and currency conversion to USD as of the filing date

Joint sponsor package (when the petitioner can't qualify)

- [ ] Joint sponsor eligibility check: U.S. citizen or LPR, 18+, domiciled in the U.S., and independently meets 125% for THEIR OWN household size plus the immigrant — incomes of petitioner and joint sponsor cannot be combined
- [ ] Joint sponsor's own Form I-864, signed — the petitioner still must file their own I-864 even at $0 income
- [ ] Joint sponsor's proof of citizenship or LPR status
- [ ] Joint sponsor's most recent tax return or transcript (+ W-2s/1099s), employment letter, and pay stubs — the full parallel set
- [ ] Joint sponsor's spouse contributing income: add Form I-864A and that spouse's tax/income documents
- [ ] Maximum two joint sponsors per family case, and each immigrant can rely on only one — plan the split if derivatives are involved
- [ ] Brief the joint sponsor honestly on the obligation before they sign (see Notes) — an uninformed joint sponsor who backs out mid-case costs months

Filing logistics

- [ ] AOS cases: the I-864 set goes inside the I-485 package (fee $0)
- [ ] Consular cases: pay the $120 AOS review fee in CEAC, upload the full set, and bring updated originals to the interview
- [ ] If a tax season passes while the case is pending, refresh the set with the new year's return/transcript before the interview
- [ ] Keep a complete copy of everything submitted — the sponsor will need it if NVC or USCIS questions the figures

Notes: The I-864 is an enforceable contract with the U.S. government and the immigrant — it lasts until the immigrant naturalizes, earns 40 quarters of work credits, permanently leaves, or dies. Divorce does NOT end the obligation. The most recent year's tax return or transcript is mandatory — "I haven't filed yet" means file (or document why not required) before submitting. Assets must cover 5× the shortfall (3× for a citizen sponsoring a spouse/child) — most families are better served by a joint sponsor than by asset math. Check the current I-864P before relying on any dollar figure. Usher Law Group, P.C., (718) 484-7510.