

Name Applicant 1 \_\_\_\_\_

Name Applicant 2 \_\_\_\_\_

Birthday Applicant 1 \_\_\_\_\_ Birthday Applicant 2 \_\_\_\_\_

Preferred Accommodations \_\_\_\_\_

*If finances are separate, please complete individual Confidential Financial Forms.*

**If this form is prepared by someone other than you, please complete the following:**

Name \_\_\_\_\_

Relationship to above Applicant(s) \_\_\_\_\_

Address \_\_\_\_\_

City \_\_\_\_\_ State \_\_\_\_\_ Zip \_\_\_\_\_

Email \_\_\_\_\_ Cell \_\_\_\_\_

**Financial Statement** (Attach extra page if necessary):

Schedule of all real property: Approximate Value

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |

*Approximate Total Value of Real Property:* \_\_\_\_\_

Schedule of all other assets (stock, bonds, savings, etc.): Approximate Value

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |

*Approximate Total Value of Other Assets:* \_\_\_\_\_

Schedules of all liabilities (mortgages, etc.): Approximate Value

|  |  |
|--|--|
|  |  |
|  |  |
|  |  |

*Approximate Total of all Liabilities:* \_\_\_\_\_

*Approximate Net Assets Balance:* \_\_\_\_\_

Please List Monthly Income Below:

Applicant 1

Applicant 2

Social Security:

\_\_\_\_\_

\_\_\_\_\_

Pension Income\*:

\_\_\_\_\_

\_\_\_\_\_

Interest:

\_\_\_\_\_

\_\_\_\_\_

Dividend:

\_\_\_\_\_

\_\_\_\_\_

Real Estate:

\_\_\_\_\_

\_\_\_\_\_

Other:

\_\_\_\_\_

\_\_\_\_\_

Total Monthly Income:

\_\_\_\_\_

\_\_\_\_\_

Do you anticipate any significant changes to your financial situation in the next five years: \_\_\_\_\_

If yes, please explain: \_\_\_\_\_

\* Pension: If you receive pension, please provide the following information:

When did/does pension start?

\_\_\_\_\_

\_\_\_\_\_

Monthly pension amount:

\_\_\_\_\_

\_\_\_\_\_

If a lifetime pension, is it at that rate?

\_\_\_\_\_

\_\_\_\_\_

If not, please explain: \_\_\_\_\_

If not a lifetime pension please explain: \_\_\_\_\_

What percent of pension survives  
to you/spouse if applicable?

\_\_\_\_\_

\_\_\_\_\_

Please describe any Long Term Care Insurance benefits you have:

\_\_\_\_\_

\_\_\_\_\_

*I (We) affirm that this information is substantially complete and correct to the best of my (our) knowledge.*

Signature 1

Date

Signature 2

Date