

UNDERSTANDING YOUR FINANCIAL RESOURCES

Name of Prospective Resident: _____

Today's Date: _____

Assets:	Resident	Guarantor (if any)
Cash	\$	\$
Checking	\$	\$
Savings	\$	\$
Money-Market	\$	\$
Certificates of Deposit	\$	\$
Securities (Stock/Bonds)	\$	\$
Trust	\$	\$
Annuities (if not yet paying monthly)	\$	\$

Monthly Income:	Resident	Guarantor (if any)
Salary	\$	\$
Social Security	\$	\$
Pensions/Annuities (if not above)	\$	\$
IRA (if not above)	\$	\$
Interest/Dividend Income	\$	\$
Rental Income	\$	\$
Trust	\$	\$
Investments/Other	\$	\$
Long-Term Care Insurance REAL ESTATE: (description/location)	\$	\$
Property: _____ Name on Deed/Title: _____		
Property: _____ Name on Deed/Title: _____		

Other Assets:	Resident	Guarantor (if any)
Cash Value Life Insurance	\$	\$
Vested Pension Benefits	\$	\$
Business Interests	\$	\$
Automobiles	\$	\$
Other	\$	\$
TOTAL ASSETS:	\$	\$

YOUR STORY. TO BE CONTINUED.
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