

# BETHANY+VILLAGE

THE ART OF LIVING

## THE COTTAGES Independent Living & Duplexes

### Financial Questionnaire

All Information provided will be held confidential

#### Regular Monthly Income

	First Person	Second Person
Social Security	\$	\$
Pension	\$	\$
Dividends	\$	\$
Interest	\$	\$
Mortgage/Rental Income	\$	\$
IRA Income	\$	\$
Trust Income	\$	\$
Long Term Care Insurance	\$	\$
Other Income	\$	\$
<b>Total Monthly Income</b>	\$	\$

#### Capital Assets

	First Person	Second Person
Cash (Savings & Checking)	\$	\$
CD's, Money Market, etc	\$	\$
Stocks and Bonds	\$	\$
IRA's, Annuities, etc	\$	\$
House	\$	\$
Other Real Estate	\$	\$
Trust Fund	\$	\$
Life Insurance	\$	\$
Other Assets	\$	\$
<b>Total Assets</b>	\$	\$

I hereby declare that all statements made herein are true according to my best knowledge and belief. In witness whereof, I have set my hand to this application this \_\_\_\_\_ day of \_\_\_\_\_ 20\_\_

\_\_\_\_\_  
Resident's Name (Print)

\_\_\_\_\_  
Signature of 1<sup>st</sup> Person or DPOA

\_\_\_\_\_  
Signature of 2<sup>nd</sup> Person or DPOA