

**PRELIMINARY APPLICANT INFORMATION AND INCOME AND ASSET DISCLOSURE
FOR THE ROSE AFFORDABLE SENIOR ASSISTED LIVING COMMUNITIES**

This Preliminary Applicant Information and Income and Asset Disclosure form will permit the property manager to screen your eligibility for residing at the property. More detailed information and verifications will be required prior to your actual approval for residency. This prescreening is intended to allow you and the property manager to recognize immediately any issues of income eligibility that exist. Your cooperation will facilitate the processing of your application and will avoid surprises later in the process. As you complete this form, please contact us with any questions.

Thank you for applying for residency in our affordable senior living community. Before you complete this form, please tell us how you learned about our property, including specific sources such as the specific newspaper ad or a particular referral person or organization. _____

APPLICANT INFORMATION				
Household Member No.	Applicant(s) Name	Relation	Social Security No.	Date of Birth
1.				
2.				

How may we contact you for additional information if needed?

Contact Name: _____

Home Phone: _____ Work Phone: _____ Cell Phone: _____

E-mail Address: _____

GROSS ANNUAL INCOME					
Household Member No.	Wages	Self Employment	Social Security/SSI/ Pension/Disability/Workers Comp. Payments./Veterans Benefits	Public Assistance	Other--e.g., recurring financial contributions or gifts
1.					
2.					
TOTAL					

ASSETS AND OTHER INCOME		
Assets	Cash Value*	Actual Income from Asset
Cash on Hand		
Checking Account		
Savings Account		
Safety Deposit Box		
Certificates of Deposit		

Assets	Cash Value*	Actual Income from Asset
Money Market Funds		
Stocks		
Bonds		
IRA Accounts		
401 Accounts		
Keogh Accounts		
Trust Funds <ul style="list-style-type: none"> • Revocable • Irrevocable 		
Real Property, including home or rental property		
Land Contracts, including Contracts for Deed or Mortgages		
Lump Sum Receipts in last 2 years, including inheritance or personal injury receipts		
Capital Investments		
Life Insurance Policies (excluding term policies)		
Other Retirement/Pension Funds not included above		
Personal Property held as an investment: e.g., coin collections, art, antique cars. Do not include necessary personal property.		
Other		

*Cash value is defined as the market value minus the cost of converting the asset to cash. The cost of conversion includes such fees as broker's fees, settlement costs, early withdrawal penalties, etc.

Yes No Within the last two (2) years I/we have sold or given away assets (including cash, accounts, real estate, etc.) for less than the asset's fair market value

If yes, please list the assets below.

Asset	Cash Value	Value Received	Date Disposed

Please sign and date your application, then fax or send it to the respective Property Manager for your selected community. Thank you!

SIGNATURE

DATE