

BARTLETT WOODS RETIREMENT COMMUNITY

Financial Resources Form

Name(s) _____

| 1. MONTHLY INCOME: | SELF | SPOUSE |
|-----------------------------|-----------------|-----------------|
| Social Security | \$ _____ | \$ _____ |
| Pension | \$ _____ | \$ _____ |
| Annuity | \$ _____ | \$ _____ |
| Interest | \$ _____ | \$ _____ |
| Dividends | \$ _____ | \$ _____ |
| Rental Income | \$ _____ | \$ _____ |
| Misc./Other | \$ _____ | \$ _____ |
| TOTAL MONTHLY INCOME | \$ _____ | \$ _____ |

| 2. PERSONAL ASSETS: | SELF | SPOUSE |
|-----------------------------------|-----------------|-----------------|
| Checking | \$ _____ | \$ _____ |
| Savings | \$ _____ | \$ _____ |
| Securities (<i>stock/bonds</i>) | \$ _____ | \$ _____ |
| Cert. of Deposit | \$ _____ | \$ _____ |
| Real Estate | \$ _____ | \$ _____ |
| Life Ins. (<i>cash value</i>) | \$ _____ | \$ _____ |
| Other Assets | \$ _____ | \$ _____ |
| TOTAL ASSETS | \$ _____ | \$ _____ |

3. DEBTS: (Debts, mortgages, obligations, etc., affecting income on assets)

| | |
|-------|----------|
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |
| _____ | \$ _____ |

I ATTEST that the information provided herein is correct to the best of my knowledge.

Signature

Date

Co-resident

Date

Signature if prepared by someone other than Bartlett Woods member(s).

Date



**BARTLETT
WOODS**

Revised 10/4/2016