

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

20 Bartlett Drive • Rockland, ME 04841 • 207.593.1608