



DUNWOODY VILLAGE

3500 West Chester Pike • Newtown Square, PA 19073
 610-359-4400 • Fax 610-359-4586 • 1-800-DUNWOODY
 Hearing Impaired 1-800-654-5984 • www.dunwoody.org



FINANCIAL STATEMENT

The Board of Trustees of DUNWOODY VILLAGE, a Pennsylvania not-for-profit corporation, respects the privacy of every applicant and does not wish to intrude into any applicant's personal financial circumstances other than to have assurance that the applicant has adequate financial resources to live comfortably at Dunwoody Village. The Board is not interested in total estate, but rather only sufficient assets to cover admission costs, monthly charges for life and personal needs and obligations. This information will be kept confidential. (If two people are applying and keep separate finances, please fill out separate Financial Statements.)

1. Name: Applicant #1 _____ Date of Birth _____
 Address _____ City _____ State _____ Zip _____
 Applicant #2 _____ Date of Birth _____
 Address _____ City _____ State _____ Zip _____
 Unit Size Desired: _____

2. List value and type of sufficient resources from which the entrance fee will be paid:

| | Value | | Type |
|-------------|----------|-------|-------|
| Real Estate | \$ _____ | _____ | _____ |
| Securities | \$ _____ | _____ | _____ |
| Savings | \$ _____ | _____ | _____ |
| Other | \$ _____ | _____ | _____ |
| Total | \$ _____ | _____ | _____ |

3. List sufficient resources from which monthly charges and personal needs will be paid.
 (Please submit a copy of your Federal Income Tax Return)

| | Amount | | | Total Yearly |
|-------------------------------|----------|-----------|----------|--------------|
| Social Security | \$ _____ | per month | \$ _____ | _____ |
| Pensions | \$ _____ | per month | \$ _____ | _____ |
| Annuity | \$ _____ | per month | \$ _____ | _____ |
| Trust | \$ _____ | per month | \$ _____ | _____ |
| Rental | \$ _____ | per month | \$ _____ | _____ |
| Dividends | \$ _____ | per month | \$ _____ | _____ |
| Interest on Savings | | | \$ _____ | _____ |
| Interest on Certificates | | | \$ _____ | _____ |
| Bonds (Government, Municipal) | | | \$ _____ | _____ |
| Other (Describe) _____ | | | \$ _____ | _____ |

4. What expenses will you continue to have when you become a resident of Dunwoody Village? _____

5. Do any of the following items increase, and if so, on what basis? Will there be a change with the death of one spouse?

Pensions _____
 Annuity _____
 Trust _____
 Rental _____

6. Identify stocks and bonds (or attach schedule) excluding those which will be sold to pay entrance fee.

| # Shares | Description | Annual Income |
|----------|-------------|---------------|
| | | |
| | | |
| | | |
| | | |
| | | |

7. Real Estate—other than real estate which will be sold to pay entrance fee.

| Location | Approximate Valuation | Annual Income (after expenses) | Term of Lease |
|----------|-----------------------|--------------------------------|---------------|
| | | | |
| | | | |
| | | | |

8. The following are my/our advisors and their firms, with names, addresses and phone numbers, and may be consulted regarding my/our admission to Dunwoody Village.

Banker or Trust Officer _____

Stock Broker _____

Attorney _____

Other _____

9. Insurance—Health.

Medicare # _____

BC-BS Plan C or Comparable Insurance, Group # _____ Agreement # _____

Other Contract # _____

10. Tenants Homeowners Coverage will be carried by:

Insurance Company _____

11. I affirm that the foregoing is a true statement of facts known to me and that it is submitted as part of an application for residency at Dunwoody Village.

Date _____ Signed _____

Spouse's Signature _____

For office Use Only: Unit Type _____ Occupancy ___ Single ___ Double

Approved by: _____ Date: _____