



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 _____
 Type of Residential Home Desired: _____

2. Assets: Please list your assets below. (Attach schedule if more space is needed.)

	Value	Type
Real Estate #1\$	_____	_____
Real Estate #2\$	_____	_____
Securities \$	_____	_____
Savings \$	_____	_____
IRA \$	_____	_____
Other \$	_____	_____
Total \$	_____	_____

3. Gross Income: Please list your gross monthly income below.

	Monthly Amount	Total Yearly
Social Security \$ _____ per month	\$ _____	\$ _____
Pensions \$ _____ per month	\$ _____	\$ _____
Annuity \$ _____ per month	\$ _____	\$ _____
(# of years of annuity payments remaining _____)		
Trust \$ _____ per month	\$ _____	\$ _____
Rental Income \$ _____ per month	\$ _____	\$ _____
Dividends Annual	\$ _____	\$ _____
Interest Income Annual	\$ _____	\$ _____
Other (Describe) _____	\$ _____	\$ _____

4. Please provide an estimate of your monthly personal expenses after you become a resident of Dunwoody Village. Monthly Amount \$ _____

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. Please include the following documents with this Financial Statement:

- Pages 1 &2 of most recent year of IRS tax return (If you itemize, please include Schedules A-E.)
- Most recent investment account statements (summary page showing total balance is acceptable)
- Other relevant information (e.g. Savings and Checking account statements, personal worksheets, etc.)

7. Liabilities:
Please list your liabilities, such as mortgages, loans and any other debt you currently carry.

Description	Amount
	\$ _____
	\$ _____
	\$ _____

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 _____

Investment Advisor _____

Attorney _____

Other _____

9. Insurance–Health.
 Medicare # _____
 BC-BS Plan C or Comparable Insurance, Group # _____ Agreement # _____
 Contract # _____

10. Resident(s) Homeowners Personal Liability Insurance 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 _____ Applicant #1 Signature _____
 Applicant #2 Signature _____

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

Approved by: _____ Date: _____