



PRELIMINARY INFORMATION

Date: _____ Time: _____ Interested In: Ashland Manor
 Olde Towne Manor
Name: _____ Age: _____ New Hope Manor

Address: _____ Phone: _____

Gender: (M) - (F) Any Special Needs: Yes No F/T Student: Yes No
Sect. 8: Yes No

Move-In Date: _____ ***No Pet Policy***
(Except A Service Dog As Defined By The ADA March 2011)

Race/Ethnicity:
 Hispanic/Latino
 American Indian/
Alaska Native
 Asian
 Black/African American
 Native Hawaiian/
Other Pacific Islander
 White
 I Decline To Provide

✓ **Income Verification**
 Employment (Gross Wages/Yr.): \$ _____
 Unemployment/Welfare: \$ _____
 Social Security (Gross Amt./Yr.): \$ _____
 Pension (Gross Amt./Yr.): \$ _____
 Other (Gross Amt./Yr.): \$ _____

Income Sub-Total: \$ _____

Asset(s) Verification*

Qty.	Balance/Value	Int. Rate	Int./Dividends Income
<input type="checkbox"/> Checking Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Savings Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Money Mkt. Acct(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Cert(s) Of Deposit:	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Annuity(ies):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Bond(s):	\$ _____	x _____ %	= \$ _____
<input type="checkbox"/> Stock(s):	\$ _____		Dividends = \$ _____
<input type="checkbox"/> Mutual Fund(s):	\$ _____		Capital Gains/Dividends = \$ _____
<input type="checkbox"/> Life Insurance:	\$ _____		Dividends = \$ _____

Int./Cap. Gains/Div. Sub-Total: \$ _____

Real Estate: \$ _____ Appraised Value - OR -

Total Asset(s) Value: \$ _____ x 0.06 % = \$ _____
(Imputed Income)

TOTAL ANNUAL INCOME: \$ _____

*Attach a separate sheet for any additional accounts

INSTRUCTIONS

Please complete the entire sheet. Should you have any questions regarding any of the information required, please don't hesitate to contact our office at 215-295-1443, extension 100 for Marge Reca or extension 103 for Marilee Gillespie.

1. Income Verification:

- A. Employment – Please list the gross annual amount (including taxes) from a year ending paystub or W-2 Form.
- B. Unemployment/Welfare - Please list the gross annual amount (including taxes, if any). If an amount is received for a period of less than one year, please list both the actual length of time and amount.
- C. Social Security – Please list the gross annual amount (including the Medicare deduction, if applicable). At the end of every year, you receive a notice from the Social Security Administration advising you of your new benefit amount for the next year. If you don't have this form to reference, you can take the amount you receive each month, add the medicare deduction to it, then times this amount by 12 (months).
- D. Pension – Please list the gross annual amount (including any deductions taken for medical coverage, union dues, etc.). You may refer to a 1099 Form (if you receive one from the pension company) or take the amount you receive each month, add any deductions to it, then times this amount by 12 (months).

Add all above amounts together and enter that figure for the Income Sub-Total.

2. Asset(s) Verification:

- A. Checking, Savings, Money Market, Certificate(s) of Deposit, Annuities and Bond(s) – Please list the current balance or cash surrender value of each of these and their interest rate. Multiply each balance or value by their interest rate and list that amount under the Int./Dividends Income.
- B. Stocks and Mutual Funds – Please list their current value and either the total dollar amount of interest, dividends or capital gains earned last year (refer to a 1099 Form); or, the total dollar amount of interest, dividends or capital gains earned year-to-date (refer to a most recent investment company statement)
- C. Life Insurance – If you have the type of insurance that builds a cash value inside of it, please list that value. Typically, this type of insurance also pays dividends. Please list either the dividends you received last year (refer to a 1099 Form) or the value of the additional insurance protection they bought you (refer to most recent insurance company statement).

Add all the interest, dividends, and capital gains totals together and list that amount for the Sub-Total.

- D. Real Estate – If you have a formal real estate appraisal, please list that value. Otherwise, enter a value appropriate to what other similar homes in your neighborhood have recently been sold for.

- 3. Add together all the current balances or values in Section(s) 2 A-D above and list that amount for the Total Asset(s) Value.
- 4. Multiply the Total Asset(s) Value by 0.06% and list that amount under the Int./Dividends Income.
- 5. Whichever is the greater amount (either the Sub-Total from 2-A through 2-C – OR – the Total Asset(s) Value by 0.06% amount under the Int./Dividends Income); add it to the Income Sub-Total from 1 above to arrive at a TOTAL ANNUAL INCOME.