



Redstone Highlands[®]
Communities

**CONFIDENTIAL AND REQUIRED
RESIDENT FINANCIAL DISCLOSURE
FOR**

Name of Applicant (1st Person)

Date of Birth (1st Person)

Name of Applicant (2nd Person)

Date of Birth (2nd Person)

Today's Date

**FINANCIAL
REPORT**

Name(s) _____

ASSETS	ADDTL INFO/FINANCIAL INSTITUTION (Please do not include account numbers)	VALUE
REAL ESTATE	1. Jointly owned? YES NO 2. I intend to sell this property, retain the proceeds, and will provide Redstone with a copy of the sales agreement as proof that the real estate listed has sold at fair market value. YES NO	
REAL ESTATE	1. Jointly owned? YES NO 2. I intend to sell this property, retain the proceeds, and will provide Redstone with a copy of the sales agreement as proof that the real estate listed has sold at fair market value. YES NO	
CHECKING (PRIMARY)	INSTITUTION	
CHECKING (SECONDARY)	INSTITUTION	
SAVINGS (PRIMARY)	INSTITUTION	
SAVINGS (SECONDARY)	INSTITUTION	
CD	INSTITUTION	
CD		
STOCKS		
BONDS		
IRA		
ANNUITY	Is your access to the principal restricted? YES NO	
BROKERAGE ACCOUNT (include cash, stocks, bonds)		
OTHER ASSETS	DESCRIPTION:	
TOTAL ASSETS		

**FINANCIAL
REPORT**

Name(s) _____

INSURANCE POLICIES	ADDITIONAL INFORMATION (Please do not include account numbers)	VALUE
LIFE INSURANCE	BENEFICIARY	
LIFE INSURANCE	BENEFICIARY	
LONG TERM CARE INSURANCE	TOTAL VALUE OF POLICY	
LONG TERM CARE INSURANCE	TOTAL VALUE OF POLICY	

INCOME	MONTHLY
SOCIAL SECURITY 1st Person	
SOCIAL SECURITY 2nd Person	
PENSION 1st Person	
PENSION 2nd Person	
INTEREST	
DIVIDENDS	
OTHER	
TOTAL INCOME	

LIABILITIES	TOTAL
LOAN(S)	
MORTGAGES	
CREDIT CARD DEBT	
TAXES (Not reported on F/A Tool)	
OTHER	
TOTAL LIABILITIES	

OTHER	TOTAL
ANNUAL CHARITABLE GIVING	
DIVESTMENTS OR ONE-TIME DONATIONS MADE IN THE LAST 5 YEARS.	

**FINANCIAL
REPORT**

Name(s) _____

Are you/your spouse a veteran?		YES		NO
Do you have a prenuptial agreement?		YES		NO
Do you have an irrevocable burial trust?		YES		NO
Have any assets been moved out of your name in the last 5 years?		YES		NO
Do you have assets in a trust?		YES		NO
If YES, is the Trust Revocable or Irrevocable?		Revocable		Irrevocable

Is anyone other than you responsible for your financial information?

If yes, who? Name: _____ Phone: _____

Address: _____

THE ABOVE INFORMATION IS CORRECT TO THE BEST OF MY KNOWLEDGE.

Please note that upon application to Redstone Highlands, the expectation is that the assets and income disclosed are intended to be utilized for housing and services provided by Redstone and to pay general usual expenses of the resident upon becoming a resident at Redstone. Any divestment of assets/income will most likely impede the resident's access to Redstone's Benevolent Care Fund. Approval for Benevolent Care is at the sole discretion of Redstone Presbyterian Senior Care.

DATE: _____ RESIDENT/REPRESENTATIVE: _____