

PREFACE: This form, though brief, is of utmost significance both to you as a future resident and to Masonic Village at Burlington. (Please note the conditions of the Residency Agreement.) Therefore, your cooperation in providing a full and honest disclosure is to your benefit.

Date _____ Residence No. and Type _____ Telephone # _____

FIRST PERSON'S NAME _____ Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Birth Date _____ E-Mail _____

SECOND PERSON'S NAME _____ Address _____

City _____ State _____ Zip Code _____

Social Security # _____ Birth Date _____ E-Mail _____

*** Please attach supporting documentation.

FINANCIAL DATA			MONTHLY INCOME	
ASSETS (LESS ENCUMBRANCES):			First Person	Second Person
1. Property Value	\$ _____		4. Social Security	\$ _____
2. Mortgage Amount	\$ _____		5. Pension & Retirement	\$ _____
3. Financial Assets	First Person	Second Person	(Sole Survivor)	% _____ % _____
a. Checking	\$ _____	\$ _____	6. Other*	\$ _____
b. Savings	\$ _____	\$ _____	TOTAL MONTHLY	\$ _____
c. Stocks/Bonds	\$ _____	\$ _____		
d. IRA/Mutual	\$ _____	\$ _____	TOTAL COMBINED MONTHLY	\$ _____
e. Trusts	\$ _____	\$ _____		
f. Other	\$ _____	\$ _____		
TOTAL COMBINED ASSETS	\$ _____			

*Note: These items should identify the specific investment in the asset column from which the income is derived.

Have you listed your home for sale? If yes, attach the listing agreement. If no, please give your timeframe. _____

Notes to Financial Data and Monthly Income (by line item number). Include information on long term liabilities, if any. _____

I HEREBY DECLARE THAT ALL STATEMENTS MADE HEREIN ARE TRUE ACCORDING TO MY BEST KNOWLEDGE AND BELIEF. IN WITNESS WHEREOF I HAVE HEREUNTO SET MY HAND TO THIS APPLICATION THIS _____ DAY OF _____, 20 _____

First Person

Second Person

Witness

Witness