



Confidential Financial Statement

As part of your application to Goodwin House, please provide us with the information requested below. To provide details that do not fit on this form, please submit additional documents separately.

1. Personal Information

First Person Birthdate

Second Person (if applicable) Birthdate

2. Assets

Please list your assets in the table below, indicating whether each asset is owned separately or jointly.

	First Person	Second Person	Joint
<i>Type of Asset</i>	<i>Amount</i>	<i>Amount</i>	<i>Amount</i>
Real Estate #1—current market value			
Real Estate #2—current market value			
Cash: Checking, savings, certificates of deposit, etc.			
Stocks: Current market value of stocks not included in accounts listed elsewhere.			
Bonds: Current market value of bonds not included in accounts listed elsewhere.			
IRA (including Roth IRAs)			
401(k) (including 403(b)s)			
Trust funds where the principal and/or income are available for your use			
Annuities: List total here and also include monthly income in section 3, below			
Other asset #1:			
Other asset #2:			
Other asset #3:			

3. Monthly Income

Please list your **gross** monthly income in the table below. Indicate whether or not each source of income is inflation adjusted by writing "Yes" or "No" in the column provided. It is also important to list survivor benefits where applicable. Survivor benefits are paid to a designated beneficiary upon the death of the original owner/recipient. Survivor benefits often are defined as a percentage of the original benefit. Please include those percentages below.

<i>Type of Income</i>	First Person			Second Person		
	<i>Amount</i>	<i>Survivor Benefit %</i>	<i>Inflation Adjusted?</i>	<i>Amount</i>	<i>Survivor Benefit %</i>	<i>Inflation Adjusted?</i>
Pension						
Social Security						
IRA Income						
401(k) Income						
Annuity #1						
Annuity #2						
Annuity #3						
Alimony						
Other #1						
Other #2						
Other #3						

If you are not yet taking income from an IRA, 401(k) or 403(b), in what year will you start?

First Person _____ Second Person _____

Projected income from IRA, 401(k), or 403(b) when you begin taking it?

First Person _____ Second Person _____

4. Please provide us with additional information about your annuities and other income:

How many years of payments remain on **each annuity**?

What is the source of **other income**?

Annuity #1	
Annuity #2	
Annuity #3	

Other #1	
Other #2	
Other #3	

10. Long-Term Care Insurance

If you have long-term care insurance, please complete the table below, using your most recent premium and coverage information. Also, please include a copy of your policy with your application.

Information Requested	First Person	Second Person
What is the benefit period?		
What is the elimination period?		
Is there a lifetime maximum? If so, what is the amount?		
What is the assisted living daily reimbursement rate?		
What is the nursing care daily reimbursement rate?		
What is the home & community based daily reimbursement rate?		
Is the plan inflation adjusted? If so, what is the inflation rate?		
What is the annual premium?		
Does the annual premium increase each year? If so, how much?		

11. Please include with this Confidential Financial Statement the following documents:

- The last three years of tax filings (If you itemize, please include Schedules A-E.)
- Other relevant info (e.g. LTC insurance policy, personal worksheets, etc.)

12. Certification

By signing below, I certify that the information included herein is true and complete to the best of my knowledge. I understand that any information intentionally or unintentionally misstated may result in the termination of my resident agreement with Goodwin House Incorporated.

Signature Date

Signature Date

Please mail completed application to preferred location:

Goodwin House Alexandria

4800 Fillmore Avenue
Alexandria, VA 22311
703-824-1233

Goodwin House Bailey's Crossroads

3440 S. Jefferson Street
Falls Church, VA 22041
703-578-7125

Goodwin House at Home

4800 Fillmore Avenue
Alexandria, VA 22311
703-575-5202

Visit us at www.goodwinhouse.org

