

Part II- Financial Information

In addition to completing the attached financial application, we need you to submit the following statements with the application:

- Insurance Cards
- Checking Accounts (last 3 months)
- Savings Accounts (last 3 months)
- Stocks (most recent)
- Bonds (most recent)
- CDs (most recent)
- Annuities (most recent)
- Pensions (most recent)
- Real Estate/Property Values (appraisal if available or real estate listing)
- Cash Value of Life Insurance (most recent)
- One year of tax returns
- Social Security Award Letter* (Letter that is sent annually that indicates the amount of Social Security one will receive for the year. Bank statements that reflect this information cannot be used in place of this letter.)

All information disclosed to Caritas House Assisted Living will be kept confidential.