

**HIGHFIELD MASONIC HOME of DELAWARE, INC.**

**Confidential Financial Statement**

Financial information is required to determine whether you now need or may need financial aid in the future. It is requested that you provide an accurate account.

<u>ASSETS:</u>	Descriptions (location if applicable)	Value
	Checking account(s) _____	\$ _____
	_____	\$ _____
	Savings account(s) _____	\$ _____
	Cash value-life insurance _____	\$ _____
	Certificate(s) of deposit _____	\$ _____
	Stocks, Bonds and Securities (attach detailed list or brokers statement)	
	_____	\$ _____
	_____	\$ _____
	Real Estate (location) _____	\$ _____
	Other assets including debts owed to you.	
	_____	\$ _____
	_____	\$ _____
<b>Total assets</b>	_____	\$ _____

Have you disposed of any property or other assets and/or made gifts in excess of one thousand dollars (\$1,000.00) within the preceding thirty-six (36) months:  
( ) Yes ( ) No If yes, please attach a complete explanation to this application.  
The above is to assure that the Applicant(s) has/have not divested his or herself of assets needed later for their financial support.

<u>Liabilities:</u>	
Mortgage Balance	\$ _____
	\$ _____
Loan(s) Balance(s)	\$ _____
	\$ _____
Credit Cards/Charge Accounts (total owed)	\$ _____
	\$ _____
Other	\$ _____
	\$ _____
<b>Total Liabilities</b>	\$ _____

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Monthly Income:

Social Security \$ \_\_\_\_\_  
Pension \$ \_\_\_\_\_  
Annuity \$ \_\_\_\_\_  
Dividends \$ \_\_\_\_\_  
Interest \$ \_\_\_\_\_  
Other Income (describe) \$ \_\_\_\_\_  
Assistance from Family Members \$ \_\_\_\_\_

If necessary, will your children or other relatives help financially with your care?  
( ) Yes ( ) No

Monthly Expenses:

Housing Expenses(rent, mortgage) \$ \_\_\_\_\_  
Loans \$ \_\_\_\_\_  
Credit Card(s) \$ \_\_\_\_\_  
Insurance(health, long term care) \$ \_\_\_\_\_  
Other (describe) \$ \_\_\_\_\_  
\$ \_\_\_\_\_  
\$ \_\_\_\_\_

I HEREBY DECLARE THAT ALL OF THE FOREGOING STATEMENTS ARE TRUE.

\_\_\_\_\_ Date

\_\_\_\_\_ Signature of Applicant or Representative

The Masonic Home has the right to require the resident to provide documentation of the resident's financial status at least annually. If the resident's financial status has substantially changed since the time of admission or the last financial disclosure, Masonic Home has the right to require payment of all charges from a resident admitted on a financial aid basis or to allow a paying resident to continue to reside at the Masonic home on a financial aid basis. The change of payment or financial aid basis shall commence at the time of the change of the financial status of the resident.