

**TREYTON OAK TOWERS
FINANCIAL INFORMATION**

NAME _____

SPOUSE/CO-RESIDENT NAME _____

ASSETS

Equity in Residence	\$	
Savings & CD's	\$	
Stocks	\$	
Bonds	\$	
Checking Accounts	\$	
Other Real Estate Equity	\$	
Whole Life Insurance Cash Value	\$	
Other _____	\$	
TOTAL COMBINED ASSETS	\$	

MONTHLY INCOME

	FIRST RESIDENT	SPOUSE/SECOND RESIDENT
Social Security	\$ _____	\$ _____
Pension & Retirement	\$ _____	\$ _____
Other _____	\$ _____	\$ _____
TOTAL MONTHLY INCOME	\$ _____	\$ _____

Amount of your monthly income that is derived from your assets listed above \$ _____

For couples, does your monthly income from pension/retirement change if one spouse passes? If so, what amount of your monthly income is reduced \$ _____

I hereby declare that all statements made herein are true according to my best knowledge and belief.

RESIDENT SIGNATURE

DATE

SPOUSE/CO RESIDENT SIGNATURE

DATE

RETIREMENT COUNSELOR

DATE

ADMINISTRATOR

DATE