



722 Furnace Hills Pike
Lititz, PA. 17543
717-626-2071

Office Use only: Date application received: _____ Notes:

INITIAL APPLICATION FOR RESIDENCY

It is the policy of United Zion Retirement Community (UZRC) to consider for residency all persons regardless of race, age, sex, color, national origin, ancestry, religious creed, handicap or disability. Apartment and cottage residents must be 62 years or older or at the expected age of residency, if applying as two applicants, one applicant must be 62 years or older.

ACCOMMODATIONS DESIRED:

Cottage____ Apartment____ Personal Care____ Nursing Care____

What would be your ideal timing for future residency? (Month & year)_____

PERSONAL INFORMATION

Youngest Applicant

Second Applicant (Indicate "same" as applies)

Name _____

Address _____

Land Line Phone _____

Cell Phone _____

Email Address _____

Date of Birth _____ Age _____

Date of Birth _____ Age _____

Primary Occupation _____

Year of Retirement _____

Religious Affiliation (Denomination) _____

Name of Congregation _____

City/State _____

Check one:

Single _____ Married _____ Widow(er) _____ Divorced _____ Other _____

FINANCIAL INFORMATION

(If assets, liabilities, or income are joint, divide equally between applicants or list in one column.)

Youngest Applicant**ASSETS:**

Cash/Checking \$ _____
 Savings/Money Mkt. \$ _____
 CD's \$ _____
 Variable Annuities \$ _____
 Mutual Funds \$ _____
 IRA's \$ _____
 Stocks & Bonds \$ _____
 403(b) / 401K \$ _____
 Home Value \$ _____
 Other Real Estate \$ _____
 Trust Funds \$ _____
 Trust Type: Revocable _____ or Irrevocable _____
 Value of business \$ _____
 Loans to others \$ _____
 Other \$ _____
TOTAL \$ _____

LIABILITIES: (Principle amounts)

Auto Loan/Lease \$ _____
 Mortgage \$ _____
 Notes Payable \$ _____
 Credit Card Debt \$ _____
 Other Debt \$ _____
TOTAL \$ _____

INCOME: (Monthly amounts)

Social Security \$ _____
 Pensions \$ _____
 Pension Survivor Ben. Yes/No _____
 Fixed Annuity Inc. \$ _____
 Rental Income \$ _____
 Other Income \$ _____
TOTAL \$ _____

Second Applicant**ASSETS:**

Cash/Checking \$ _____
 Savings/Money Mkt. \$ _____
 CD's \$ _____
 Variable Annuities \$ _____
 Mutual Funds \$ _____
 IRA's \$ _____
 Stocks & Bonds \$ _____
 403(b) / 401K \$ _____
 Home Value \$ _____
 Other Real Estate \$ _____
 Trust Funds \$ _____
 Trust Type: Revocable _____ or Irrevocable _____
 Value of business \$ _____
 Loans to others \$ _____
 Other \$ _____
TOTAL \$ _____

LIABILITIES: (Principle amounts)

Auto Loan/Lease \$ _____
 Mortgage \$ _____
 Notes Payable \$ _____
 Credit Card Debt \$ _____
 Other Debt \$ _____
TOTAL \$ _____

INCOME: (Monthly amounts)

Social Security \$ _____
 Pensions \$ _____
 Pension Survivor Ben. Yes/No _____
 Fixed Annuity Inc. \$ _____
 Rental Income \$ _____
 Other Income \$ _____
TOTAL \$ _____

Address and type of other real estate: _____

Information on Business: _____

Specify other income: _____

Have you assigned and/or transferred any assets for less than fair market value within the past five years? Yes _____ No _____ If yes, explain: _____

Do you own assets or have income not listed in the above section? Yes / No

If yes, explain: _____

Youngest Applicant

Second Applicant

Social Security Number _____

Long-Term Care Insurance: Yes No

Yes No

Insurance Carrier _____

Member # _____

Note:

In order to receive credit for long-term care coverage, supply a copy of your benefits summary page.

Describe special interests or hobbies:

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How did you first learn about United Zion Retirement Community?

Who was the person of greatest influence in your decision to apply?

_____ Relationship to you _____

Do you intend to bring a pet? Yes ___ No ___ If yes, describe:

Have you consulted with an attorney about financial planning for long-term care needs?

Yes ___ No ___ If yes, explain:

In order to determine my (our) eligibility for residency, I (we) understand that United Zion Retirement Community (UZRC) will investigate my (our) background and the completeness and accuracy of the information provided above. I (we) certify the information in this application and the supporting documentation I/we provided to be complete and accurate and authorize United Zion Retirement Community to investigate any of the above information for verification. I/we understand that such an investigation may include but is not limited to reviewing and verifying the documents I/we have

provided, conducting a search of property value websites (such as Zillow.com) and conducting a search of Sex Offender Registries. I (we) understand any misrepresentation, including financial, insurance and health information, may be considered grounds for refusal of admission or termination of residency thereafter. I (we) understand that UZRC reserves the right to deny admission to anyone found listed on federal and state sex offender websites. The above described verifications and investigations will be used solely to evaluate applicants' eligibility for residency, and will not be used to discriminate on the basis of race, age, sex, color, national origin, ancestry, religious creed, handicap or disability.

I (we) understand that this application is not binding on UZRC or the applicant(s). It simply expresses interest in becoming a resident and is submitted to be placed on file; all information is held in the strictest confidence. I (we) understand that I (we) may be denied residency based on UZRC's findings.

Applicant's Signature _____ Date _____

Second Applicant's Signature _____ Date _____