



 **Phoebe**

Berks

WHY WONDER?

Find out if you qualify for Phoebe Berks retirement community.

Fill out the form on the back of this flyer and send it to the address below, or call 610-927-8171...you'll know in five minutes whether you financially qualify.

It's that simple!



Send this form to:
Phoebe Berks
Sales & Marketing
1 Reading Drive
Wernersville, PA 19565

**Phoebe Berks Village
Confidential Financial Information**

APPLICANT LAST NAME	FIRST NAME	MIDDLE INITIAL	BIRTH DATE
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SPOUSE LAST NAME	FIRST NAME	MIDDLE INITIAL	BIRTH DATE
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I. Assets (Market Value)	Principal Amount
1. Stocks	\$ _____
2. Bonds	\$ _____
3. Certificates of Deposit	\$ _____
4. Savings Accounts	\$ _____
5. Checking Accounts	\$ _____
6. Trust Accounts	\$ _____
7. Mutual Funds	\$ _____
8. Annuities-Corpus (Recipient: _____)	\$ _____
9. Estimated Net Value of Home	\$ _____
10. Other Real Estate	\$ _____

II. Monthly Income Sources	
1. Pensions (Applicant)	\$ _____
2. Pensions (Spouse)	\$ _____
3. Rentals	\$ _____
4. Annuity Payments	\$ _____
5. Veterans Benefits	\$ _____
6. Interest and Dividends	\$ _____
7. Other:	\$ _____

III. Social Security	
1. Applicant	\$ _____
2. Spouse	\$ _____

IV. Life Insurance	
1. Cash Value	\$ _____

V. Average Monthly Expenses (<i>Please list the monthly expenses you would incur if you were to live here.</i>)	
1. Groceries	\$ _____
2. Charitable Gifts	\$ _____
3. Entertainment	\$ _____
4. Medical Expenses	\$ _____
5. Car Loan Payment	\$ _____
6. Car Insurance	\$ _____
7. Credit Card Bills	\$ _____
8. Long Term Care Insurance	\$ _____
9. _____	\$ _____
10. _____	\$ _____
11. _____	\$ _____
12. _____	\$ _____

VI. Other Liabilities: _____	\$ _____
Total Expenses	\$ _____