

Can you afford to live at Emerald Heights? What size of home is right for your income? Emerald Heights can help you answer those questions with its proprietary forecasting software, which takes into account your unique combination of income, assets and age. We invite you to complete the form below and return it to: Emerald Heights, ATTN: Marketing Office—Confidential, 10901 176th Circle N.E., Redmond, WA 98052-7218. We will contact you soon to discuss your forecast results.

# Request for Financial Forecast

Date: \_\_\_\_\_

<b>HOUSEHOLD COMPOSITION</b>		<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Widowed	<input type="checkbox"/> Divorced	<input type="checkbox"/> Couple
<b>FULL NAME(S)</b>				<b>BIRTHDATE</b>	<b>GENDER</b>	
1.						
2.						
ADDRESS:			PHONE:			
CITY:	STATE:	ZIP:	EMAIL ADDRESS:			
Please provide income/information as applicable:			<b>Applicant #1</b>	<b>Joint? Y/N</b>	<b>% to Survivor</b>	<b>Applicant #2</b>
<b>MONTHLY INCOME</b>						
1. Amount of monthly Social Security (NET)			\$			\$
2. Amount of monthly pension (GROSS)			\$			\$
2a. Does pension have a Cost of Living increase?						
2b. Estimated duration of income (life or # of years)						
3. Other monthly income (annuity, IRA, rental income, net of expenses, salary, trust, other)						
Source			\$			\$
Source			\$			\$
Source			\$			\$
<b>ASSETS</b>						
4. Primary residence – estimated market value						
4a. Mortgage amount						
5. Other real estate – NET value						
6. Cash: checking, savings, money market accounts, CDs, etc.						
7. IRA/401(k) – balance/current market value						
8. Annuities – balance/cash value						
9. Current value of stocks, bonds, mutual funds						
10. Other assets (not personal property)						
Description:						
Description:						
11. Liabilities, loans and other debts						
<b>APPLICANT #1 SIGNATURE</b>				<b>APPLICANT #2 SIGNATURE</b>		

Eastside Retirement Association d/b/a Emerald Heights

10901 176th Circle NE - Redmond, WA 98052  
425.556.8100

[EmeraldHeights.com](http://EmeraldHeights.com)

