

# Willamette Manor Assisted Living APARTMENT APPLICATION

176 West C Street Lebanon, OR 97355 541-258-8178 / 541-258-8197 (FAX) www.willamette Manor.org



Applicant / Tenant Information

Studio

1 BR



12/2023

Applicant Name :

SS. No :

I need Assistance With:

Date Of Birth :

Inquirer Information or Tenant Information

Full Name

E-Mail

Address

Phone Number

Best Time To Call :

Morning

Afternoon

Evenings

Weekend

I need Help with

How did you hear about us?

Current Living Setting

Financial Information / Income Source

Private Funds

LTC Insurance

SS

Other Asset Income

Pensions

Annual Income From ALL Sources

Medicaid Case Worker Name & Number

Application Submission Instructions

1. Complete Apartment Application & Tenant Questionnaire and sign.

2. Complete Financial Checklist including **copies** of financial documents.

3. Review Consumer Summary Statement and Sign.

4. Complete Release of Information and Resident Record.

5. Call Willamette Manor to arrange Application to be submitted.

Applicant Signature :

Date:

## Financial Checklist

Thank You for your interest in our Community.

Below is the Financial Checklist that will help you gather all the required documents for submitting your Apartment Application.

We understand that some of the items on this list may not be readily available. We are here to help you navigate the process of obtaining them.

Once your needed signatures and documents have been acquired you are ready to submit your application. Please give us a call and we can get you scheduled to work with our Business Manager for your financial review.

1. In the Applicant Tenant Questionnaire you will find the form to be in a YES or NO format. *Please provide copies of any YES answer.* **ORIGINAL**
2. 6 Months of Bank Statements of EACH account held. These statements must be each individual month. ( *Note: If the statement states Page 1 of 5 it must include all pages.*) **COPY**
3. Account Information from ALL Financial Institutions such as : Pension, Retirement Funds, and all other income. **COPY**
4. Social Security Award Letter **COPY**
5. Real Market Value of any real estate owned. ( *Note: Property tax statement will show RMV.*) **COPY**
6. The balance owed on any property owned. **COPY**
7. Other asset owned ( description and fair market value )  
Prior year tax return ( for review only )



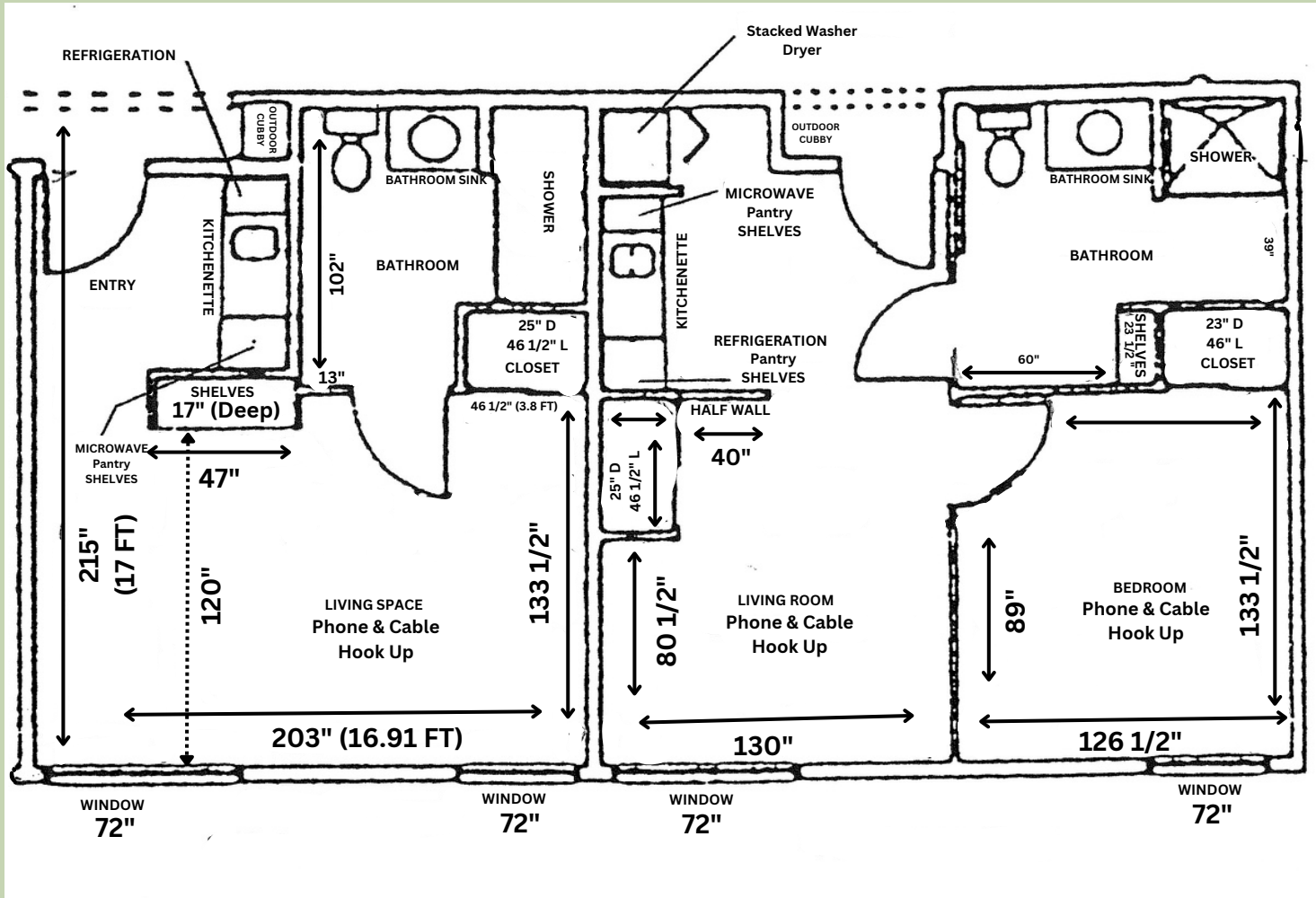
*Willamette Manor*  
ASSISTED LIVING

Site Location: 176 West C Street Lebanon, Oregon  
Main Line: 541-258-8178  
Website: [www.willamette Manor.org](http://www.willamette Manor.org)

Apartment Applications / Billing  
Business Office Manager -541-405-4849

Facility Tours  
Community Outreach - 541-405-4852





**STUDIO**  
340 Square Feet

**1 BEDROOM**  
440 Square Feet