

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 / Tennant Information

Studio

1 BR

Applicant Name :

SS. No :

I need Assistance With:

Date Of Birth :

Inquirer Information / Tennant 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 : Medicaid Case Worker Name/Number :

Private Funds

LTC Insurance

SS

Other Asset Income

Pensions

Annual Income From ALL Sources

Application Submission Instructions:

1. Complete Apartment Application & Tennant Questionnaire

2. Complete Financial Checklist including copies of financial documents

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

Financial Checklist

We understand items needed for the financial checklist may not be readily available. Please work with our Business Manager at 541-405-4849 on steps needed to acquire them.

1. In the Applicant Tennant Questionnaire you will find the form to be in a YES or NO format. Please provide copies of any YES answer.
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.)
3. Account Information from ALL Financial Institutions such as : Pension, Retirement Funds, and all other income.
4. Real Market Value of any real estate owned. (Note: Property tax statement will show RMV.
5. The balance owed on any property owned.
6. Other asset owned (description and fair market value)
7. Prior year tax return (for review only)