



W I D E H O R I Z O N , I N C .
A Christian Science Nursing Facility

Revised 2024

Request for Financial Assistance & Financial Disclosure Form

Please print and complete this Financial Disclosure Form by _____.

- The questions below pertain to the guest's household. For example, if the guest is married, income should reflect the couple's combined income.
- We do not need exact figures; reasonable estimates will work for us.

- 1) Has the guest filed a federal income tax return (IRS Form 1040) within the last five years?
- 2) Does the guest own or pay rent on his/her primary residence? If he/she owns the home, what is the street address?
- 3) How many people reside in the guest's household? If the guest lives alone or resides in a facility, the household = 1. If a spouse, parents, children, or other dependents live in the home, the household is the total number of people living in the home.
- 4) How much does the guest spend per month on housing? You may round to the nearest \$100.

Rent or mortgage (include second mortgage)	\$ _____
Property tax on primary residence*	\$ _____
Homeowner's or renter's insurance*	\$ _____
Co-op or homeowner association fees*	\$ _____

* If the mortgage or rent payment includes property tax, insurance, or association fees, you don't need to itemize them separately.

5) What is the gross monthly income for the guest's household? You may round to the nearest \$100.

Employment income	\$ _____
Rental property net income – provide street address(es)	\$ _____
Business income	\$ _____
Pension income	\$ _____
Annuity income	\$ _____
IRA distributions	\$ _____
401(k) distributions	\$ _____
Roth IRA distributions	\$ _____
Investment income (e.g., interest, dividends, income from the sale of investments)	\$ _____
Trust distributions	\$ _____
Social Security income	\$ _____
Social Security Disability income	\$ _____
Reverse mortgage income	\$ _____
Financial support from others (e.g., regular support from family or friends)	\$ _____
Other income	\$ _____

6) What are the combined assets of the guest's household? You may round to the nearest \$100.

Home – value of primary residence*	\$ _____
Real estate excluding primary residence* (e.g., rental, vacation, business property, etc.)	\$ _____
Cash & checking accounts	\$ _____
Health savings account (HSA)	\$ _____
Other savings accounts & CDs	\$ _____
Stocks, bonds, and mutual funds	\$ _____
401(k) accounts	\$ _____
Individual Retirement Accounts (IRAs)	\$ _____
Annuities	\$ _____
Simplified Employee Pensions (SEPs)	\$ _____
Assets held in Trust	\$ _____
Cash value – not death benefit – of life insurance	\$ _____
Leisure vehicles – not primary transportation (e.g., boats, RVs, collectible cars, etc.)	\$ _____
Other assets (e.g., cryptocurrencies, minerals, collectibles, etc.)	\$ _____

* Websites such as zillow.com and reator.com provide estimates of home value. On the home page of their websites, simply enter the property address.

For each property, please provide the street address, value, and amount owed.

7) What are the combined liabilities of the guest's household? You may round to the nearest \$100.

Mortgage balance (include second & reverse mortgages)	\$ _____
Home equity loan	\$ _____
Auto loans	\$ _____
Student loans	\$ _____
Credit cards – only the portion carried as debt and not paid off each month	\$ _____
Other loans and/or debt	\$ _____

When you submit this disclosure, you will receive an email that will tell you if additional documentation is needed, and if so, how it can be submitted. Additional documents that may be needed are:

- a complete copy of the applicant's most recent tax return including IRS Form 1040 and all associated schedules
- applicant's [Social Security Benefit Verification Letter](#)
- if married, the applicant's spouse's [Social Security Benefit Verification Letter](#)
- Trust documents
- durable or financial Power of Attorney

Please return to business@widehorizon.org.