

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: _____

Household Composition		<input type="checkbox"/> Single	<input type="checkbox"/> Married	<input type="checkbox"/> Widowed	<input type="checkbox"/> Divorced	<input type="checkbox"/> Couple
Full Name(s)					Birth Date	Gender
1. _____					_____	_____
2. _____					_____	_____
Address: _____				Phone: (_____) _____		
City: _____		State: _____	Zip: _____	E-mail: _____		
Please provide information as applicable:		Applicant #1	Joint? Y/N	% to Survivor	Applicant #2	% to Survivor
MONTHLY INCOME						
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 yrs)		_____	_____	_____	_____	_____
3. Other monthly income (Annuity, IRA, rental income net of expenses, salary, trust, other)		_____	_____	_____	_____	_____
Source		\$ _____	_____	_____	\$ _____	_____
Source		\$ _____	_____	_____	\$ _____	_____
Source		\$ _____	_____	_____	\$ _____	_____
ASSETS						
4. Primary Residence — estimated market value		\$ _____	_____	_____	\$ _____	_____
4b. 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		\$ (_____)	_____	_____	\$ (_____)	_____
Signature (Applicant #1)			Signature (Applicant #2)			
_____			_____			

EASTSIDE RETIREMENT ASSOCIATION
D/B/A EMERALD HEIGHTS

