

**ISENHOUR BLECK, P.L.L.C.**

1200 Fifth Avenue, Suite 2020  
Seattle, Washington 98101-3132  
(206) 340-2200

**CONFIDENTIAL  
FINANCIAL INFORMATION**

Personal Information

**LONG TERM CARE  
CANDIDATE**

**SPOUSE (IF ANY)**

Full name:

\_\_\_\_\_

\_\_\_\_\_

Birth date:

\_\_\_\_\_

\_\_\_\_\_

Citizenship:

\_\_\_\_\_

\_\_\_\_\_

Address where you live:

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

\_\_\_\_\_

Phone:

\_\_\_\_\_

\_\_\_\_\_

Email:

\_\_\_\_\_

\_\_\_\_\_

Supplemental Health  
Insurance

\_\_\_\_\_

\_\_\_\_\_

Veteran:  
(Space Bar will check box.)

Yes  No

Yes  No

Marital status:

married  single  widowed  divorced

Care Center

Assisted Living  Adult Family Home  Nursing Home

Name

\_\_\_\_\_

Address

\_\_\_\_\_

County

\_\_\_\_\_

Date of Admission:

\_\_\_\_\_

Assets/Resources

Bank and Credit Union Accounts: (checking, savings or money market)

Bank/Credit Union	Owner/Name on Account	Type of Account	Balance

Stocks, Bonds, Mutual Funds, CDs:

Investment	Financial Institution	Owner/ Name on Account	Balance

Life Insurance:

Company	Insured	Owner of Policy	Cash Surrender Value

Annuity:

Company	Acct. No.	Owner	Balance

IRAs/Other Retirement Accounts:

Company	Acct. Type	Owner	Balance

Real Estate:

Location	Owner	Fair Market Value

Real Estate Sold in the Past Five Years:

Location	Owner	Fair Market Value

Vehicles/Boats/RVs:

Type	Year	Model	Value	Owe

Other Assets:

Burial Plots             Yes     No      Prepaid Funeral Plans     Yes     No

Income

Type	Self	Spouse
Social Security		
Pension		
Other		
Other		
Other		
Other		

Shelter Expenses

Rent/Mortgage: \_\_\_\_\_  
 Space Cost: \_\_\_\_\_  
 Property Assessments: \_\_\_\_\_  
 Property Taxes: \_\_\_\_\_  
 Homeowners Insurance: \_\_\_\_\_  
 Electricity: \_\_\_\_\_  
 Phone: \_\_\_\_\_  
 Water/Garbage/Sewer: \_\_\_\_\_  
 Heat: (gas, electric, oil) \_\_\_\_\_

Gifts Made in Last Five Years

To Whom	What	Date	Value

Estate Plan

- Last Will and Testament                     Yes     No  
Community Property Agreement             Yes     No  
Durable Power of Attorney for Finances    Yes     No

Please bring your estate plan documents to the appointment