

MASONIC HOME OF FLORIDA LIFE CARE APPLICATION GUIDELINES

On behalf of The Grand Lodge Officers and the Board of Trustees of the Masonic Home, we are pleased to provide you with our Life Care Application. Please read the instructions **before** completing the application. The secretary of your sponsoring lodge will be your primary contact for submission the application. The Masonic Home staff is also available if you have questions. If a Power of Attorney is being utilized, include a copy with the application.

One application per person is required. Do not combine husband and wife on one application.

PERSONAL INFORMATION

Pages 1 through 7

Complete each section of the application in detail. If a particular question does not apply, state not applicable (N/A). Item 2 on page 7 should include mother's maiden name. Attach additional sheets if the space provided is inadequate. Include all current debt and any personal property, such as automobiles, on page 7.

CONTRACT OF APPLICANT

Pages 8 through 13

Read the contract thoroughly. If any section is not understood, contact the Masonic Home for clarification. This will be signed at the time of admission. **Do not sign at this time.**

DISCLOSURES

Pages 14 through 15

These pages should be read and initialed by the Applicant.

INTERMENT INFORMATION

Page 16

The Applicant will review and sign the document. If the Applicant has pre-paid arrangements, attach copies and sign this acknowledgement.

ATTORNEY'S REVIEW NOTICE

Pages 17 through 18

Upon the review of all documentation, the Applicant will sign before a notary public. Note, we are unable to provide legal advice to the Applicant. **Be sure to initial only one selection.**

ACKNOWLEDGMENT FOR CHILD OF APPLICANT

Pages 19 through 20

This document must be signed by each of the Applicant's natural and adopted children before a notary public. Please make additional copies as may be required for each child.

SPONSORING LODGE DOCUMENTATION

Pages 21 through 23

These pages are completed by the sponsoring lodge. The applicant will meet with an appointed investigation committee, and upon the completion of the investigation, the application is presented to the lodge and D.D.G.M. for approval of sponsorship.

MEDICAL RECORDS AUTHORIZATION

Page 24

This can be signed upon admission.

PHYSICIAN'S REPORT

Pages 25 through 28

The Physician's Report, TB test and Determination of Capacity should then be completed by the Applicant's personal physician. Note that CBC reports and TB test results must be dated within thirty (30) days of submission of the completed application. Applications will not be processed without medical information. **In addition, attached copies of all Medicare and Insurance Cards.**

SAMPLE FORMS

Pages 29 through 44

These forms should be reviewed by the Applicant. The Applicant may also choose to have his/her personal attorney review and explain these documents. Upon admission, an updated Last Will and Testament and Power of Attorney will be executed. These are samples only and should not be signed.

BANK /INVESTMENT ACCOUNT STATEMENTS

Copies of all financial statements (Checking, Savings, Money Market, Certificates of Deposits, etc.) and Brokerage or Investment Account Statements must be provided **for the last five (5) years. DO NOT STAPLE STATEMENTS.**

Include any current statements on outstanding loans or credit cards. This includes automobile, mobile home, etc. Also include any documentation concerning bankruptcy or foreclosures in the last five years.

LIFE INSURANCE

If original policies are not available, the Applicant should request copies. In addition, please contact all life insurance companies to request ownership and beneficiary change forms. These will be signed and processed upon admission.

TAX RETURNS

Copies of the Applicant's tax returns for the preceding five years are required to be submitted with the application. **DO NOT STAPLE RETURNS.** Transcripts of missing returns can be obtained through the IRS.

Alternatively, if the Applicant has not filed a return for the last five years or any year within this period, the written response by the Internal Revenue Service should be attached. Please refer to

the IRS website for the appropriate form. Usually you will need a Form 4506-T. You will also be provided fax numbers for faster service. Please provide proof of the request with the application if the transcripts have not yet been received.

EXISTING ESTATE PLANNING

If applicable, provide copies of your most recent estate planning documents. In particular, we will require copies of any Trusts Agreements you may have executed, together with a list of all assets, including, but not limited to real estate, stocks, bonds, investment accounts, etc., transferred to and/or held in the name of the trustee.

REMEMBER

Due to the amount of time involved in reviewing information, applications and supporting documentation, must be submitted to the Admissions Office of the Masonic Home no later than **ten (10) days** prior to the next regular meeting of the Board of Trustees. Incomplete or untimely applications will be held over to the following month.

Additional Information to be included with application, if applicable. Copies are acceptable at this time.

Military separation documents

Marriage certificate

Birth certificate