☐ Date_____
☐ APP Fee in
☐ Copy of Cards
☐ Copy of COVID Card
☐ Copy FPOA/ MPOA
☐ Copy POLST
☐ Scan to MR _____
☐ Financials
☐ Copies (3) ☐ FD
☐ Move-in date_____
☐ Keys, Card, Mailbox
☐ Name Plate _____:
☐ Parking sign?_____

1st	2nd
☐ DU	☐ DU
☐ BV	☐ BV
☐ GA	☐ GA

☐ 1 bd. ☐ 2 bd.

$5k Community fee, Per Person, is due for the following, upon Occupancy:
☐ TJ ☐ LP
☐ MC ☐ SN
☐ Counselor_____
☐ Timeline _____

FRANKE TOBEY JONES

Enjoy your age

Application for Residency
Franke Tobey Jones
Retirement Estates
5340 N. Bristol St.
Tacoma, WA 98407
(253) 752-6621 main, (253) 756-1862 fax

Franke Tobey Jones is a Not for Profit CCRC 503© for persons 62 years or older that meet the financial and health requirements. An application fee of $1000 (per person) must accompany this completed application. The application fee is refundable within the first (7) years of the date of application. A Refund must be requested in writing, addressed to the Director of Admissions. The application fee does not go towards the first month or entrance fee; however, it does go towards the Community fee in the Tobey Jones Building only.

An incomplete application may delay your admission.

Name _____
(First) (Middle) (Last) Home phone

Address_____
(Street) (City) (State) (Zip)

cell phone (_____) _____ e-mail _____

Gender: ❍ Female ❍ Male Birth date _____ Age _____

Place of Birth _____ Wedding Anniversary date, if applicable _____

Marital Status: ❍ Married ❍ Never Married ❍ Separated ❍ Divorced ❍ Widowed

Race/Ethnicity: ❍ America Indian/Alaskan Native ❍ Asian Pac. Islander ❍ African American, not of Hispanic origin ❍ Hispanic ❍ White, not of Hispanic origin

Military Service: ❍ Air Force ❍ Army ❍ Coast Guard ❍ Marines ❍ Navy
Religion: (if you want to disclose) _____

Social Security # _____ Medicare # _____

Medicare Supplemental Insurance Provider _____

Subscriber # _____ Group # _____ Phone # _____

Please provide a copy of: (or bring in and we can make a copy for you)
❍ Driver's License/ID ❍ Medicare Card (New) ❍ POLST ❍ Medical Insurance Card
❍ Medical & Financial Power of Attorney

Was the fact that FTJ is a Continuing Care Community (We offer all levels of care) a big part of your decision to apply here? ❍ Yes ❍ No _____
How did you hear about us? _____
Do you know anyone who lives @ FTJ? _____
What did you like most about FTJ? _____

Personal Contacts

Primary Contact: _____
(Name) (E-mail)
Phone: _____
(Work) (Home) (Cell)
Address_____
(Street) (City) (State) (Zip)
Relationship _____ ❍Medical Power of Attorney ❍Financial Power of Attorney

---

Contact #2: _____
(Name) (E-mail)
Phone: _____
(Work) (Home) (Cell)
Address_____
(Street) (City) (State) (Zip)
Relationship _____ ❍Medical Power of Attorney ❍Financial Power of Attorney

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Contact #3: _____
(Name) (E-mail)
Phone: _____
(Work) (Home) (Cell)
Address_____
(Street) (City) (State) (Zip)
Relationship _____ ❍Medical Power of Attorney ❍Financial Power of Attorney

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Send billing information to: _____ ❍ Financial Power of Attorney
(Name)
Address _____
(Street) (City) (State) (Zip)
Phone: _____
(Work) (Home) (Cell)

Do you have a Long-Term Care Policy? ❍ Yes ❍ No
Name of Long-Term Care Provider: _____

Name of current facility (if at one) _____

Contact person at facility _____Phone # _____

Lifetime occupation _____
Education: (check highest level completed) ❍ 8th Grade/less ❍ 9-11th Grade ❍ High school
❍ Tech/Trade school ❍ Some college ❍ bachelor's degree ❍ Graduate degree
Interests/Hobbies:

- ☐ Arts/Culture
- ☐ Church
- ☐ Cards/Board Games
- ☐ Food/Cooking
- ☐ Cycling
- ☐ Dancing
- ☐ Fitness/Sports
- ☐ Knitting/Sewing/Quilt
- ☐ Gardening
- ☐ Golf
- ☐ Movies
- ☐ Music
- ☐ Painting
- ☐ Pets
- ☐ Photography
- ☐ Reading
- ☐ Sporting Events
- ☐ Life-long learning/Sr U
- ☐ Traveling
- ☐ Volunteering
- ☐ Walking/Hiking
- ☐ Wine/Beer Tasting
- ☐ Writing/Journaling
- ☐ Woodworking

Medical Contacts

Primary Physician_____
(Name) (Phone) (Fax)
Address_____
(Street) (City) (State) (Zip)

Alt. Physician _____
(Name) (Phone) (Fax)
Address_____
(Street) (City) (State) (Zip)

Dentist _____
(Name) (Phone) (Fax)
Address_____
(Street) (City) (State) (Zip)

Preferred Hospital _____ **Pharmacy** _____

Mortuary_____
(Name) (Phone)
Address_____
(Street) (City) (State) (Zip)

I understand that my application shall comprise the Personal Section, Legal Section, Financial Section and Medical Section and that a deposit must accompany the application in order that I may be placed on the Waiting List.
I understand that failure to disclose the financial information will disqualify me from applying for subsidy in the future should I deplete my assets.

Within the last 20 years have you been convicted of a felony pertaining to Drugs, narcotics, theft, or assault of any kind? _____ yes _____ no

If yes, please explain (a conviction record alone will not necessarily bar you from residency)._____

_____ _____
Signature Date

Valid Driver's Car information:
must have a working, drivable car with a valid DL for a parking space.

❍ Year_____ ❍ Make_____ ❍ Model_____

❍ Color_____ ❍ Plate #_____ ❍ DL #_____

CONFIDENTIAL FINANCIAL INFORMATION

Each applicant is asked to disclose personal financial information in this section. This information enables Franke Tobey Jones, as a continuing care retirement community, to assess the financial needs of the applicant over time, including the potential future need for charitable subsidy. The charitable subsidy program at Franke Tobey Jones is designed to provide assistance to residents who become unable to pay their fees, so that residency and care may continue within our community. Please note Franke Tobey Jones does not have a contract with Medicare or Medicaid, so these resources should not be relied on to fund future care needs in our community.

The information provided in this disclosure is kept strictly confidential. We ask that you answer every question to make sure the information is complete. It is not necessary to provide exact amounts, account numbers or statements. You may elect not to disclose this financial information; however, you should be aware that in the application process for Charitable Subsidy, priority is given to applicants who provided personal financial information to Franke Tobey Jones at admission.

Please check the appropriate statement, and sign below:

_____ **I elect not to disclose this financial information** with the awareness that in the application process for Charitable Subsidy, you would not be eligible to apply for subsidy if you exhaust your resources. Priority is given to those who provide personal financial information to Franke Tobey Jones at admission.

_____ **The information in this application is true and accurate to the best of my knowledge**.

_____
Applicant Name(s) printed

_____ _____
Applicant Signature Date

Monthly Income

Income Source:	1st Person	2nd Person	Total
Social Security	$_____	$_____	$_____
Pensions	$_____	$_____	$_____
Investment Income	$_____	$_____	$_____
Rental Income	$_____	$_____	$_____
Other	$_____	$_____	$_____

Total Monthly Income **$_____**

Assets (use estimates, the numbers do not need to be exact**)**

Savings/Money Market Accounts:

Description		Current Balance
_____	_	$_____
_____		$_____
_____		$_____

Property: (Home, land, rental,etc.)

Description		Estimated Value
_____	_	$_____
_____		$_____
_____		$_____

Other Property or resources (life insurance cash value, etc:)

Description	Estimated Value
_____	$_____
_____	$_____

Investments: (Stocks/Bonds/IRA/Notes/Trusts)

Description		Current Value
_____	_	$_____
_____		$_____
_____		$_____
_____	_	$_____

Total Assets $_____

Mortgage Balances/Debts/Liabilities/Credit Card Balances

Description	Current Balance Due
_____	$_____
_____	$_____
_____	$_____

Total Liabilities $_____

Long Term Care Insurance

Do you have a Long Term Care Insurance policy that covers skilled nursing care or assisted living (not a supplemental policy)? Yes___ No___

If yes, how long does the policy cover? _____

If yes, what amount does the policy provide in coverage? _____

Consent for Treatment

In case of emergency, I hereby authorize Franke Tobey Jones staff to summon help from the nearest or most readily available emergency or paramedical squad. I authorize following the squad's advice, including transfer to the nearest hospital, if recommended. I understand that I am responsible for costs incurred for such services. The Resident consents to nursing and other care as provided by the staff at Franke Tobey Jones (FTJ), including routine diagnostic procedures and medical treatment as ordered by the attending physician. Resident authorizes the attending physician his/her assistants, and the licensed nursing staff to administer and perform all necessary medical nursing treatments. The Resident agrees to maintain a physician appointed by the Resident, as Attending Physician for the Resident, at all times. This appointment may be changed at any time by the Resident with notice to FTJ and the physician.

I understand Franke Tobey Jones has the right to terminate my Residency Agreement if my physical or mental health exceeds the scope of care provided at this community, or in case of medical emergency or imminent danger to resident or others.

_____ _____

Printed Name of Resident Date

_____

Signature of Resident/Responsible Party Date

If signature by an authorized representative, print name and relationship to the resident.

_____ _____

Printed Name of Authorized Representative Relationship/Date

FRANKE TOBEY JONES
Enjoy your age

Future Resident's Health History

Name of Resident _____ Date _____

1. How would you describe your Health Status in the last 90 days? (check one)

   ☐ Excellent ☐ Good ☐ Fair ☐ Poor

2. Your best guess at your current weight: _____ Current height: _____

3. Has your weight increased or decreased by more 10 pounds?
   in the last 6 months?..... ☐ No ☐ Yes

4. Do you have any limitations on your activity?..... ☐ No ☐ Yes
   a. If yes, what kind of limitations? (i.e. bathing, dressing, toileting, medications, etc.)

   _____

   _____

   b. Please check any of the following that apply to you:

   ☐ Shortness of breath ☐ Need for oxygen
   ☐ Low energy ☐ Hard to get out of a chair
   ☐ Hard to walk on uneven ground ☐ Pain limits my activity
   ☐ I consider myself physically fit

5. Do you have any physician prescribed dietary needs? ☐ No ☐ Yes
   a. If yes, please describe (your food preferences will be collected in the Interest Profile):

   _____

   b. Do you have any difficulty swallowing? ☐ No ☐ Yes

6. Have you had a fall within the last 6 months? ☐ No ☐ Yes
   a. Did it result in injury? ☐ No ☐ Yes

7. Do you use a walker or wheelchair? ☐ No ☐ Yes
   a. If yes, which do you use and how often?

   _____

8. Do you have any limitations in any of the following?

   Hearing? ☐ No ☐ Yes Do you use aids? ☐ No ☐ Yes
   Vision? ☐ No ☐ Yes Do you use aids? ☐ No ☐ Yes
   Taste? ☐ No ☐ Yes

9. Have you had any problems with your skin? ☐ No ☐ Yes
    a. If yes, please describe (i.e. chronic rashes, skin irritants, etc.):

    _____

    _____

10. Do you have chronic infections? ☐ No ☐ Yes
    a. If yes, how is it being treated?

    _____

    _____

11. Have you had a flu shot? ☐ No ☐ Yes Date: _____
    a. Have you had a pneumovax immunization? ☐ No ☐ Yes Date: _____
    b. Have you had a COVID-19 vaccine? ☐ No ☐ Yes Date: _____

12. Have you been hospitalized in the past year? ☐ No ☐ Yes
    a. If yes, please describe the reason:

    _____

    _____

    _____

    b. Where?

    _____

13. Do you have a pacemaker? ☐ No ☐ Yes

14. Do you have anyone helping you at home with any of the following:
    a. Jobs around the house? (cleaning, yard work, making meals, laundry, etc.) ☐ No ☐ Yes
    b. Shopping or getting to personal appointment? ☐ No ☐ Yes
    c. Your personal care? ☐ No ☐ Yes

15. Please indicate if you have experienced any of the following in the past 6 months:
    a. Episodes of anxiety? ☐ No ☐ Yes
    b. Episodes of depression? ☐ No ☐ Yes
    c. Reduced desire to eat or take medication? ☐ No ☐ Yes
    d. Substance abuse? ☐ No ☐ Yes
    e. Changes in sleep patterns? ☐ No ☐ Yes
    f. Difficulty concentrating on a specific task? ☐ No ☐ Yes
    g. Trouble remembering recent events? ☐ No ☐ Yes
    h. Trouble remembering things from the past? ☐ No ☐ Yes
    i. Difficulty finding words or finishing a thought? ☐ No ☐ Yes

_____ _____

Signature of person completing form Please Print Name & Relationship/ Date