



Kāhala Nui Application Check-List

CONFIDENTIAL DATA PROFILE:

- ☐ One form for each applicant
- ☐ Item #12: Name of Power of Attorney
 - Please provide name other than spouse
- ☐ Item #26: Primary Care Physician (PCP)
 - Please provide fax number
- ☐ How did you hear about Kāhala Nui? Please list source below:

FINANCIAL STATEMENT:

☐ ASSETS

For supporting documents, please provide copy of the most recent **Summary Page** (with **Name & Account Value** – do not need to provide whole document)

- Account Statements for Cash, Investments, IRAs, Annuities, etc.
- Other supporting documents for Assets/Income

Real Estate

- Please provide tax assessed value (from City & County)
- For Other Real Estate, please list address below:

☐ REGULAR MONTHLY INCOME

Please provide gross income for:

- Social Security
- Pension

AGREEMENT FOR FUTURE OCCUPANCY:

- ☐ Please remember to sign and date the back of the Agreement
- ☐ Please also list your apartment preferences #1 & #2
- ☐ Waitlist Deposit check of \$5,000, payable to Kāhala Nui

BENEFITS AND PRICING WORKSHEET:

- ☐ Please choose (2) models for waitlist

