

INTRODUCTION TO APPLICATION FOR ADMISSION TO THE MASONIC HOME (LIFE CARE)

On behalf of your Grand Lodge Officers and the Board of Trustees of the Masonic Home, we are pleased to provide you with our Life Care Application. While many of your questions may be answered upon your review of these instructions, you are more than welcome to contact the Masonic Home or our General Counsel with questions or comments. Ultimately, we will have a Committee available to respond to questions relating to the application and our admission procedures.

The Application is set out as follows:

PERSONAL INFORMATION

Pages 1 through 7

This portion is to be completed by or on behalf of the Applicant.

Please complete each section of the application in complete detail. In the event a particular inquiry does not apply, please state inapplicable (N/A). If the space provided is inadequate, please add additional sheets and attach them to the application. Copies of documentation responsive to any of the informational requests should be attached.

CONTRACT OF APPLICANT

Pages 8 through 13

Upon the review of this document, it must be signed by the Applicant before a notary public. In the event a power of attorney is being utilized on behalf of the applicant, a complete copy must be provided.

DISCLOSURES

Pages 14 through 15

Upon the review of this information, these pages are to be initialed by the Applicant.

INTERMENT INFORMATION

Page 16

Upon the review of this information, this page is to be signed by the Applicant. In the event the Applicant has made pre-paid arrangements, copies of this documentation should be attached.

ATTORNEY'S REVIEW NOTICE

Pages 17 through 18

Upon the review of this disclosure, it must be signed by the Applicant before a notary public. In the event a power of attorney is being utilized on behalf of the Applicant, a complete copy must be provided. **Please note we are unable to provide legal advice to the Applicant. Matters pertaining to the indebtedness of an Applicant must be addressed by the Applicant's own attorney.**

ACKNOWLEDGMENT(S) FOR CHILD/ CHILDREN 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.

MEDICAL RECORDS AUTHORIZATION

Page 21

Upon the review of this information, this page is to be signed by the Applicant.

SPONSORING LODGE DOCUMENTATION

Pages 22 through 24

It is imperative that the sponsoring lodge be immediately made aware of the Applicant's intention to submit an application for admission to the Masonic Home of Florida. It will be necessary for the matter to be brought before the lodge, voted upon, an investigation committee appointed, and upon the completion of such investigation, the execution of these documents accompanied by the lodge minutes. These documents as well as the minutes must bear the seal of the lodge.

PHYSICIAN'S REPORT

Pages 25 through 28

As this portion of the Application is to be completed by the Applicant's physician, an appointment should be scheduled by the Applicant as soon as possible. Please note that CBC reports, Chest X-Rays and the results of TB tests must be dated within ninety (90) days of submission of the completed application.

SAMPLE OF FORMS

Pages 29 through 44

These forms, together with a deed to any real property owned by the Applicant, Department of Motor Vehicle transfer forms, if applicable, and such other documents as may be required by the Digest of Masonic Law will be prepared for the Applicant and are required to be signed upon admission.

ADDITIONAL DOCUMENTATION

Please note that while these additional document requests may seem extensive or overly burdensome, they are required in order that we may fully review your circumstances and to expedite your application.

BANK /INVESTMENT ACCOUNT STATEMENTS

Copies of all bank statements (Checking, Savings, Money Market and Certificate of Deposits) and Brokerage or Investment Account Statements must be provided **for the last five (5) years.**

In the event your bank statements do not include copies of checks, please understand we may call upon the Applicant to explain and/or provide copies of checks whose amounts are deemed excessive in comparison to their usual expenses or are otherwise extraordinary.

LIFE INSURANCE

We have found that perhaps one of the most common reasons for delays in admission upon approval of an Applicant relate to the transfer of ownership and changing the beneficiary arrangement of life insurance policies, annuities, etc. The Applicant should request ownership and beneficiary change forms as well as a current value statement of the policies immediately upon receipt of the application.

REAL/PERSONAL PROPERTY

If you have recently sold or refinanced your home, automobile or other property, the furnishing of the closing statements or other documentation for these transactions will again prevent delays in your application and our need for further inquiry. A copy of your mortgage statement, owner's policy of title insurance and survey for any real property owned will assist in expediting your Application.

TAX RETURNS

Complete copies of the Applicant's tax returns with all Schedules for the preceding five years are required to be submitted **with the application**.

If the Applicant has filed tax returns and they are not in his/her possession or obtainable through their accountant, an IRS Form 4506 (see attached) must be completed and forwarded to the Internal Revenue Service immediately. **The tax returns are required to be submitted with the completed Application.**

As each form only allows for a request of four (4) years, it may require the submission of two forms. The following link will take you directly to the form which can be completed on screen, printed and mailed

<http://www.irs.gov/pub/irs-pdf/f4506.pdf>

Alternatively, if the Applicant has not filed a return for the last five years or any year within this period, we will require the written response by the Internal Revenue Service to a telephone request (800-829-1040) by the Applicant

for copies of all W-2s and 1099s received by the Internal Revenue Service for the taxpayer (Applicant) in the last five years. They will fax this information to the Applicant or the Applicant may utilize the fax at our Admissions Office at (727) 821-6775.

REMEMBER

The completed application, together with all supporting documentation and a cover letter on the District Deputy Grand Master's letterhead must accompany the application.

Due to the amount of time involved in reviewing applications prior to our monthly Admissions Committee meeting, **completed applications**, together with all supporting documentation, must be received by the Masonic Home at least **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 for consideration.

In no **event** shall any personal property be removed from the Applicant's place of residence once the application process for admission to the Masonic Home of Florida has begun without the express written consent of the Admissions Committee. Similarly, no one, particularly a member of the sponsoring lodge, shall receive as a gift or purchase any personal property of the Applicant without such consent.

Last Updated: August 9, 2011