

# Financial App Form

## Page 1

**Name:** Alice Pharoah

**Name of the nursing home:** Massena

**Date Of Birth:** 1938-10-12

### Your Home Address

**Street Address:** 116 hough rd

**Address Line 2:**

**City:** Massena

**State/Region/Province:** NY

**home\_postal\_zipcode:** 13662

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### Address

**Street Address:** legacy K home

**Address Line 2:** 590 west rd

**City:** hermon

**State/Region/Province:** ny

**home\_postal\_zipcode:** 13652

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### Spouse

**spouse info:** Never married

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### Demographics

**you selected:** Filed taxes in the past 4 years

**Employment status:** retired

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### Real Estate and Vechicles your home info within the past 5 years

**Living with someone rent free:** Yes

**equity value of your home:**

**your monthly bill:**

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### Insurance Info

**Name of Homeowners insurance:**

**Have Medicare:** Yes

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**Have Medicare Replacement (Like UHC Medicare):** Yes

**Medicare #:** 4DX1TP8YK05

## Your Income Info Social Security

**Name of payer:**

**Amount:** 1765

**Frequency:** monthly

## Pension

**Name of payer:**

**Amount:** 2261.07

**Frequency:** monthly

## Pension

**Name of payer:**

**Amount:** 133.60

**Frequency:** monthly

## Annuity

**Name of payer:**

**Amount:**

**Frequency:**

## IRA distribution

**Name of payer:**

**Amount:**

**Frequency:**

## Stock Dividends

**Name of payer:**

**Amount:**

**Frequency:**

## TRUST INFO

**Trust name:**

**Garantor:**

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**Trustee:**

**Amount:**

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## Your Investments Stocks

**Company Name:**

**Approx. Value:**

## Bonds

**Company Name:**

**Approx. Value:**

## Annuity

**Company Name:**

**Approx. Value:**

## IRA

**Company Name:**

**Approx. Value:**

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## Banking info Bank #1

**Bank:** community bank

**Account #:**

**\$ Amount:** 12000

**bank\_1\_date\_closed:**

## Bank #2

**Bank:**

**Account #:**

**\$ Amount:**

**bank\_1\_date\_closed:**

## Bank #3

**Bank:**

**Account #:**

**\$ Amount:**

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bank\_1\_date\_closed:

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## Funeral Info Irrevocable prepaid burial setup

### Funeral Home

**Name:** lawrences canton

**Price:** 13000

### Best Contact

**Name:** deborah vaisey

**Email:** deborahvaisey@gmail.com

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