

Financial App Form

Page 1

Name: Estella DeLosh

Name of the nursing home: NULL

Date Of Birth: 1943-11-24

What is your Medicaid ID #: AN14391D

Your Home Address

Street Address:

Address Line 2:

City:

State/Region/Province:

home_postal_zipcode:

Spouse

spouse info: Widowed in past 5 years

Demographics

you selected:

Employment status: retired

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

Renting: Yes

Rent: \$275

your monthly bill: N/A

Insurance Info

Name of Homeowners insurance:

HMO Name and ID #: 124702306

Your Income Info Social Security

Name of payer: SSI

Amount: 1,054

Frequency: Monthly

Pension

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Name of payer:

Amount:

Frequency:

Pension

Name of payer:

Amount:

Frequency:

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:

Trustee:

Amount:

Your Investments
Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

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Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Banking info

Bank #1

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Bank #2

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Bank #3

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Funeral Info

Irrevocable prepaid burial setup

**Funeral Home
Name:**

Price:

Best Contact

Name: Janet DeLosh

Email: butrfly1958@yahoo.com

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