

# Financial App Form

## Page 1

**Name:** Deborah Defedericis

**Name of the nursing home:** Houghton Rehabilitation and Nursing Center

**Date Of Birth:** 1948-01-30

### Your Home Address

**Street Address:** 9581 Beaver Road

**Address Line 2:**

**City:** Alexander

**State/Region/Province:** NY

**home\_postal\_zipcode:** 14005

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### Address

**Street Address:** 6815 NY Rte 237

**Address Line 2:**

**City:** Byron

**State/Region/Province:** NY

**home\_postal\_zipcode:** 14422

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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

**Renting:** Yes

**Rent:** 600

**your monthly bill:** N/A

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### Own vehicle sell info in past 5 years

**Make and Model:** 2009 Ford Focus

**Fair market Value:**

# Financial App Form

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## Insurance Info

**Name of Homeowners insurance:**

**Have Medicare:** Yes

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

**Medicare #:** 1AJ4XF8PM95

**HMO Name and ID #:** UHC- 976199673

## Your Income Info Social Security

**Name of payer:**

**Amount:** 1127

**Frequency:** Monthly

## Pension

**Name of payer:**

**Amount:** 1617.90

**Frequency:** Monthly

## 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:**

# Financial App Form

Frequency:

## TRUST INFO

Trust name:

Garantor:

Trustee:

Amount:

## Your Investments Stocks

Company Name:

Approx. Value:

## Bonds

Company Name:

Approx. Value:

## Annuity

Company Name:

Approx. Value:

## IRA

Company Name:

Approx. Value:

## Banking info Bank #1

Bank: Tonawanda Valley CU

Account #: checking

\$ Amount: 50

bank\_1\_date\_closed:

## Bank #2

Bank: Tonawanda Valley CU

Account #: Savings

\$ Amount: 50

bank\_1\_date\_closed:

# Financial App Form

## Bank #3

**Bank:**

**Account #:**

**\$ Amount:**

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

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## Funeral Info Irrevocable prepaid burial setup

**Funeral Home**

**Name:** J L Mcandrew

**Price:** 3500

## Best Contact

**Name:** Toni Kusmierski

**Email:** tkusmierski@gbbores.org

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