

Financial App Form

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Name: David Wilson

Name of the nursing home: Houghton Rehab

Date Of Birth: 1953-10-16

Your Home Address

Street Address: 1078 Townline Road

Address Line 2:

City: Arkport

State/Region/Province: NY

home_postal_zipcode: 14807

Spouse

spouse info: yes

Demographics

you selected: Filed taxes in the past 4 years

Employment status: retired

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

Currently own: Yes

equity value of your home: 13,900.00

your monthly bill: N/A

Own vehicle sell info in past 5 years

Make and Model: Volkswagen Tiguan

Fair market Value: 33,000

Insurance Info

Name of Homeowners insurance: NYCM

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Have Medigap insurance (i.e. AARP or Medex)n: Yes

Medicare #: 1RJ6VC4UD58

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HMO Name and ID #: AARP 0201645721

Your Income Info Social Security

Name of payer: SS Benefits

Amount: 20,759.00

Frequency: Annually

Pension

Name of payer: NYSLRS

Amount: 1436.81

Frequency: Monthly

Pension

Name of payer: Massachusetts Mutual

Amount: 2,262.24

Frequency: Annually

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:

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Amount:

Spouse Income Info Social Security

Name of payer: SS Benefits

Amount: 24,227.00

Frequency: Annually

Pension

Name of payer:

Amount:

Frequency:

Pension

Name of payer:

Amount:

Frequency:

Annuity

Name of payer: Prudential Retirement

Amount: 14,959.00

Frequency: Annually

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

TRUST INFO

Trust name:

Garantor:

Trustee:

Financial App Form

Amount:

Your Investments
Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Spouse 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: Five Star

Account #: 277252687

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\$ Amount: 658.00

bank_1_date_closed: N/A

Bank #2

Bank: Five Star

Account #: 277252687

\$ Amount: 249.00

bank_1_date_closed: N/A

Bank #3

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Spouse Info

Name: Lisa Wilson

Spouse SS#: 128504790

Spouse DOB: 1957-07-18

Best Contact

Name: Lisa Wilson

Email: LJWilson117@yahoo.com