

# Financial App Form

## Page 1

**Name:** Rita Ohman

**Name of the nursing home:** Delhi Rehabilitation and Nursing Home

**Date Of Birth:** 1936-11-19

### Your Home Address

**Street Address:** Heritage at The Plains at Parish Homestead

**Address Line 2:** 163 Heritage Circle

**City:** Oneonta

**State/Region/Province:** NY

**home\_postal\_zipcode:** 13820

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### Spouse

**spouse info:** Widowed in past 5 years

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### Demographics

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

**Employment status:** unemployed

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

**your monthly bill:** n/a

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### Insurance Info

**Name of Homeowners insurance:**

**Have Medicare:** Yes

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

**Medicare #:** 116-24-6626-D

**HMO Name and ID #:** UnitedHealthcare Group # 15630 Member ID# 907779475-00

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### Your Income Info Social Security

**Name of payer:** 121-28-9267

**Amount:** 2119

**Frequency:** per month

# Financial App Form

## Pension

**Name of payer:** Verizon

**Amount:** 495

**Frequency:** per month

## Pension

**Name of payer:**

**Amount:**

**Frequency:**

## Annuity

**Name of payer:** Prospera Financial Services (mutual funds)

**Amount:** 50-100

**Frequency:** per month

## IRA distribution

**Name of payer:**

**Amount:**

**Frequency:**

## Stock Dividends

**Name of payer:**

**Amount:**

**Frequency:**

## TRUST INFO

**Trust name:**

**Garantor:**

**Trustee:**

**Amount:**

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## Your Investments

### Stocks

**Company Name:**

**Approx. Value:**

### Bonds

# Financial App Form

**Company Name:**

**Approx. Value:**

**Annuity**

**Company Name:** Prospera Financial Services (mutual funds)

**Approx. Value:** \$15,000

**IRA**

**Company Name:**

**Approx. Value:**

**Banking info**

**Bank #1**

**Bank:** Jeff Bank

**Account #:** 8201331

**\$ Amount:** \$9,000

**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:** Stewart-Murphy Funeral Home, Inc, Callicoon, NY

**Price:** \$11,775

**Best Contact**

**Name:** Dave Ohman

# Financial App Form

**Email:** dave.r.ohman@gmail.com

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