

# Financial App Form

## Page 1

**Name:** RODNEY MCDONALD

**Name of the nursing home:**

**Date Of Birth:** 1936-07-02

### Your Home Address

**Street Address:**

**Address Line 2:** 2312 COUNTY ROUTE 35

**City:** NORWOOD

**State/Region/Province:** NY

**home\_postal\_zipcode:** 13668

### Spouse

**spouse info:** yes

### Demographics

**you selected:**

**Employment status:** retired

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

**Currently own:** Yes

**equity value of your home:** \$139,000

**your monthly bill:** Well Water \$40.00

### Own vehicle sell info in past 5 years

**Make and Model:** 2019 Toyota Camry, 2018 Toyota Dacoma both paid for

**Fair market Value:**

### Insurance Info

**Name of Homeowners insurance:** Yes. Nationwide

**HMO Name and ID #:**

### Your Income Info Social Security

**Name of payer:** Rodney - \$2000.00

**Amount:**

# Financial App Form

Frequency:

Pension

Name of payer: Rodney\$3000

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:

## Spouse Income Info Social Security

Name of payer: Luva (Wife) \$1700

Amount:

# Financial App Form

Frequency:

Pension

Name of payer: 0

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:

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## Your Investments Stocks

Company Name:

Approx. Value:

# Financial App Form

## 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:**

## Spouse Info

**Name:** Luva Mcdonald

**Spouse SS#:** 103348369

**Spouse DOB:** 1942-02-24

## Best Contact

**Name:** Luva Mcdonald

**Email:**