

# Financial App Form

## Page 1

**Name:** Lisa Stallone

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

**Date Of Birth:** 1963-08-26

**What is your Medicaid ID #:** AW25367V

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### Your Home Address

**Street Address:** 1912 Stannards Road

**Address Line 2:**

**City:** Wellsville

**State/Region/Province:** NY

**home\_postal\_zipcode:** 14895

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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 Vehicles your home info within the past 5 years

**Living with someone rent free:** Yes

**equity value of your home:**

**your monthly bill:** N/A

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### Own vehicle sell info in past 5 years

**Make and Model:** Sold 2018 Chevrolet Corvette- Bought 2021 Buick Envision

**Fair market Value:** Traded Corvette for 19k & Buick Envision

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### Own vehicle sell info in past 5 years

**Make and Model:** Sold 2018 Chevrolet Corvette- Bought 2021 Buick Envision

**Fair market Value:** Traded Corvette for 19k & Buick Envision

**Date Sold:**

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### Your Income Info Social Security

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**Name of payer:**

**Amount:** 1871

**Frequency:** Month

**Pension**

**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**

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**Company Name:**

**Approx. Value:**

**Bonds**

**Company Name:**

**Approx. Value:**

**Annuity**

**Company Name:**

**Approx. Value:**

**IRA**

**Company Name:**

**Approx. Value:**

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**Banking info**

**Bank #1**

**Bank:** Community Bank

**Account #:** 1255074

**\$ Amount:** 699.81

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

**Bank #2**

**Bank:** Community Bank

**Account #:** 1524776

**\$ Amount:** 28396.93

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

**Bank #3**

**Bank:** Community Bank

**Account #:** 18000

**\$ Amount:**

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

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**Best Contact**

**Name:** Danielle Nye

**Email:** nyedn1214@gmail.com

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