

Financial App Form

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Name: Abe Mostofsky

Name of the nursing home: Salamanca Rehab

Date Of Birth: 1988-11-11

What is your Medicaid ID #:

Your Home Address

Street Address: 600 bates road

Address Line 2:

City:

State/Region/Province:

home_postal_zipcode: 14301

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: 1211221

Own a RENTAL PROPERTY: Yes

equity value of your home: 1211221

your monthly bill: 2322

Own vehicle sell info in past 5 years

Make and Model: chevy

Fair market Value: 21

Insurance Info

Name of Homeowners insurance: Lace-Risk Assessment

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

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Have insurance through work: Yes

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

Life Insurance (including through an annuity): Yes

Medicare #:

HMO Name and ID #:

Life Insurance provider:

Cash Value:

Policy #:

Your Income Info Social Security

Name of payer: SSA

Amount: 12211

Frequency: monthl

Pension

Name of payer: ford

Amount: 121

Frequency: yearl;y

Pension

Name of payer: djodo

Amount: 111

Frequency: monthl

Annuity

Name of payer: first life

Amount: 12111

Frequency: yearly

IRA distribution

Name of payer: 1211

Amount: 1

Frequency: YEASRLY

Stock Dividends

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Name of payer: COMPUTERSHARE A FEW COMANUES

Amount: 121

Frequency: D

TRUST INFO

Trust name:

Garantor:

Trustee:

Amount:

Spouse Income Info Social Security

Name of payer: XDSGSD

Amount: 11

Frequency: MONTHL

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

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Name of payer:

Amount:

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:

Spouse Investments Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

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Approx. Value:

IRA

Company Name:

Approx. Value:

Banking info

Bank #1

Bank: COMMUNITY

Account #: 319381383

\$ Amount: 1211

bank_1_date_closed:

Bank #2

Bank: MANDT

Account #: 121

\$ Amount: 0

bank_1_date_closed: 12/1/2024

Bank #3

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Funeral Info

Irrevocable prepaid burial setup for spouse

Funeral Home

Name:

Price:

Spouse Info

Name: Emergency Sheet

Spouse SS#: 111111111

Spouse DOB: 1976-11-11

Best Contact

Name: Med OGH

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Email: AMOSTOFSKY@PHCARE.COM
