

# Financial App Form

## Page 1

**Name:** Barbara E Lockley

**Name of the nursing home:**

**Date Of Birth:** 1947-05-23

### Your Home Address

**Street Address:**

**Address Line 2:** 13 Cedarwood Lane

**City:** Plattsburgh

**State/Region/Province:** NY

**home\_postal\_zipcode:** 12901

---

### Spouse

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

### 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

**Renting:** Yes

**Rent:** 750.00

**your monthly bill:**

---

### Own vehicle sell info in past 5 years

**Make and Model:** 2019 Buick Encore

**Fair market Value:**

---

### Insurance Info

**Name of Homeowners insurance:**

**Have Medicare:** Yes

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

**Medicare #:** 1T25KE6JW60

**HMO Name and ID #:** 991584572

# Financial App Form

## Your Income Info Social Security

**Name of payer:** James F. Lockley

**Amount:** 1730.

**Frequency:** MONTHLY

### 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:**

# Financial App Form

---

## Your Investments Stocks

**Company Name:**

**Approx. Value:**

## Bonds

**Company Name:**

**Approx. Value:**

## Annuity

**Company Name:**

**Approx. Value:** 695.00

## IRA

**Company Name:**

**Approx. Value:**

---

## Banking info Bank #1

**Bank:** Community Bank

**Account #:**

**\$ Amount:** 2000.00

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

## Bank #2

**Bank:**

**Account #:**

**\$ Amount:**

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

## Bank #3

**Bank:**

**Account #:**

**\$ Amount:**

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

---

## Best Contact

# Financial App Form

**Name:** Barbara Lockley

**Email:** BLOCKLEY417@ICLOUD.COM

---