

Financial App Form

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Name: Beverly Piechowicz

Name of the nursing home: URNC

Date Of Birth: 1928-12-11

What is your Medicaid ID #: DX99484J

Your Home Address

Street Address: 9623 Maynard Dr

Address Line 2:

City: Marcy

State/Region/Province: New York

home_postal_zipcode: 13403

Spouse

spouse info: Never married

Demographics

you selected:

Employment status:

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

Currently own: Yes

equity value of your home: 68,000

your monthly bill: 162.95

Insurance Info

Name of Homeowners insurance:

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Life Insurance (including through an annuity): Yes

Medicare #: 8WQ8V56HU65

Life Insurance provider: SBLI USA Life Insurance Company, Inc

Cash Value: 960.98

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Policy #: 330001207

Your Income Info Social Security

Name of payer:

Amount: 1507

Frequency: monthly

Pension

Name of payer: Aetna Life Ins Co Large Case Pensions

Amount: 950.52

Frequency: annually

Pension

Name of payer: Manufacturers and Traders Trust Co

Amount: 73.39

Frequency: annually

Annuity

Name of payer: TIAA

Amount: 1413.66

Frequency: annually

IRA distribution

Name of payer:

Amount:

Frequency:

Stock Dividends

Name of payer:

Amount:

Frequency:

TRUST INFO

Trust name:

Garantor:

Trustee:

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Amount:

Your Investments Stocks

Company Name:

Approx. Value:

Bonds

Company Name:

Approx. Value:

Annuity

Company Name:

Approx. Value:

IRA

Company Name:

Approx. Value:

Banking info Bank #1

Bank: First Source FCU

Account #: XXX61

\$ Amount: 2074.43

bank_1_date_closed:

Bank #2

Bank: M&T Bank

Account #: 554003013

\$ Amount: 6209.48

bank_1_date_closed:

Bank #3

Bank: M&T Bank

Account #: 15004218817334

\$ Amount: 1624.20

bank_1_date_closed:

Financial App Form

Funeral Info

Irrevocable prepaid burial setup

Funeral Home

Name: Heintz Funeral Service, Inc

Price: 11595

Best Contact

Name: Mari Brear

Email: marielaine2000@yahoo.com
