

# Financial App Form

## Page 1

**Name:** Bonnie Clark

**Name of the nursing home:** Gowanda Rehab and Nursing

**Date Of Birth:** 1939-07-11

### Your Home Address

**Street Address:**

**Address Line 2:** 430 EAST AVE APT 206

**City:** FALCONER

**State/Region/Province:** NY

**home\_postal\_zipcode:** 14733

### Spouse

**spouse info:** Never married

### Demographics

**you selected:**

**Employment status:** unemployed

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

**Renting:** Yes

**Rent:**

**Sold/Transferred in the past 5 years:** Yes

**your monthly bill:**

### Own vehicle sell info in past 5 years

**Make and Model:** Subaru Legacy

**Fair market Value:** 4100

### Sold Property Property 1

**Address:** 162 Sturges Street, Jamestown, NY 14701

**Fair Value:** 70000

**Sale Price:** 70,000

**Date Sold:** 8/23/2021

# Financial App Form

## Property 2

Address:

Fair Value:

Sale Price:

Date Sold:

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## Insurance Info

Name of Homeowners insurance:

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Medicare #:

## Your Income Info Social Security

Name of payer: Social security

Amount: 1851

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:

# Financial App Form

Frequency:

## Stock Dividends

Name of payer:

Amount:

Frequency:

## TRUST INFO

Trust name:

Garantor:

Trustee:

Amount:

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## Your Investments

### Stocks

Company Name: N/A

Approx. Value: 0

### Bonds

Company Name: N/A

Approx. Value: 0

### Annuity

Company Name: N/A

Approx. Value: 0

### IRA

Company Name: N/A

Approx. Value: 0

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## Banking info

### Bank #1

Bank: Key Bank

Account #:

\$ Amount:

bank\_1\_date\_closed:

### Bank #2

# Financial App Form

**Bank:**

**Account #:**

**\$ Amount:**

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

**Bank #3**

**Bank:**

**Account #:**

**\$ Amount:**

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

**Best Contact**

**Name:** Randall Clark

**Email:** Rjc75k@gmail.com