

# Financial App Form

## Page 1

**Name:** C. Ralph Heeter

**Name of the nursing home:**

**Date Of Birth:** 1942-07-07

### Your Home Address

**Street Address:**

**Address Line 2:** 277 Hunt Rd

**City:** Jamestown

**State/Region/Province:** New York

**home\_postal\_zipcode:** 14701

### Spouse

**spouse info:** yes

### Demographics

**you selected:**

**Employment status:** retired

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

**Currently own:** Yes

**equity value of your home:**

**your monthly bill:**

### Own vehicle sell info in past 5 years

**Make and Model:** 2019 Ford Suburban

**Fair market Value:**

### Insurance Info

**Name of Homeowners insurance:** Allstate

**HMO Name and ID #:** BCBS YJE135514005001

### Your Income Info Social Security

**Name of payer:** SSA

**Amount:** 2031

# Financial App Form

**Frequency:** monthly

## Pension

**Name of payer:** MetLife

**Amount:** 2056.61

**Frequency:** monthly

## 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:**

## Spouse Income Info Social Security

**Name of payer:** SSA

**Amount:** 911

# Financial App Form

**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:**

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## Your Investments Stocks

**Company Name:**

**Approx. Value:**

# Financial App Form

## Bonds

**Company Name:**

**Approx. Value:**

## Annuity

**Company Name:**

**Approx. Value:**

## IRA

**Company Name:**

**Approx. Value:**

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## Spouse Investments Stocks

**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:** Key Bank

**Account #:** #4281

**\$ Amount:** 6974.60

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

## Bank #2

**Bank:** Key Bank

# Financial App Form

**Account #:** #9997

**\$ Amount:** 20549.42

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

## Bank #3

**Bank:**

**Account #:**

**\$ Amount:**

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

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## Spouse Info

**Name:** Carole Heeter

**Spouse SS#:** 051-34-3332

**Spouse DOB:** 1942-08-06

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## Best Contact

**Name:** Carole Heeter

**Email:**