

Financial App Form

Page 1

Name: Claude Burdick

Name of the nursing home: Massena Rehab and Nursing Center

Date Of Birth: 1935-02-21

What is your Medicaid ID #: currently in progress

Your Home Address

Street Address: 56 Brookview Drive

Address Line 2:

City: Waddington

State/Region/Province: New York

home_postal_zipcode: 13694

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:

your monthly bill: 77.00

Own vehicle sell info in past 5 years

Make and Model: 2019 Chevy Equinox

Fair market Value: 14,603.00

Insurance Info

Name of Homeowners insurance: State Farm Insurancecw

Have Medicare: Yes

Have Medicare Replacement (Like UHC Medicare): Yes

Life Insurance (including through an annuity): Yes

Financial App Form

Medicare #: 1N51-DW3-VA04

Life Insurance provider: New York Life Insurance Co.

Cash Value: 10,526.00

Policy #: 25 805 692

Your Income Info Social Security

Name of payer: Claude Burdick

Amount: 1172.00

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

Financial App Form

Trust name:

Garantor:

Trustee:

Amount:

Spouse Income Info Social Security

Name of payer: Barbara Burdick

Amount: 475.00

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

Financial App Form

Trust name:

Garantor:

Trustee:

Amount:

Your Investments Stocks

Company Name: Capital Group

Approx. Value: 18.500.00

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:

Approx. Value:

IRA

Company Name:

Approx. Value:

Financial App Form

Banking info

Bank #1

Bank: Massena Savings and Loan

Account #: 17975618

\$ Amount: 1875.56

bank_1_date_closed:

Bank #2

Bank: Massena Savings and Loan

Account #: 17975634

\$ Amount: 3900.43

bank_1_date_closed:

Bank #3

Bank:

Account #:

\$ Amount:

bank_1_date_closed:

Spouse Info

Name: Barbara Burdick

Spouse SS#: 100308570

Spouse DOB: 1937-04-30

Best Contact

Name: Theresa Burdick

Email: tcburd77@gmail.com